



16 Mar.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,955	3.8 %	(14.7) %
BSE SENSEX	34,103	4.0 %	(12.3) %
CNX BANK	25,166	5.0 %	(17.0) %
CNX MIDCAP	14,608	2.6 %	(20.3) %
CNX SMALLCAP	4,722	1.1 %	(29.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,186	9.4 %	(18.8) %
S&P 500	2,711	9.3 %	(16.1) %
FTSE 100	5,366	2.5 %	(29.4) %
HANG SENG	24,033	(1.1) %	(15.8) %
NIKKEI	17,431	(6.1) %	(24.9) %
SHANGHAI COMPOSITE	2,887	(1.2) %	(6.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.31	0.5 %	4.4 %
EUR/USD	1.12	(0.7) %	0.1 %
GBP/USD	1.27	(1.5) %	(3.7) %
USD/JPY	104.36	(0.4) %	(4.0) %
USD/AUD	1.57	2.0 %	9.9 %
USD/SGD	1.40	0.9 %	4.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	32	0.7 %	(48.1) %
Gold(INR/10g)	41,859	(3.2) %	7.3 %
Gold Comex(USD/oz)	1,535	(2.1) %	(0.5) %
SILVER(INR/1Kg)	42,984	(5.1) %	(6.7) %
Aluminium(USD/MT)	1,677	2.1 %	(5.4) %
Copper(USD/MT)	5,531	2.7 %	(10.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.4	(0.4) %	(1.5) %

Global Economy: The US House of Representatives has passed a massive coronavirus aid package that includes free testing and paid sick leave for workers, after US. President Donald Trump declared a national emergency due to the pandemic. Preliminary data released by the University of Michigan showed a relatively modest deterioration in US consumer sentiment in the month of March. The report showed the consumer sentiment index slid to 95.9 in March after rising to 101.0 in February. Germany's consumer prices increased at a steady pace in February, final data from Destatis revealed on Friday. Consumer price inflation remained unchanged at 1.7% in February. This was in line with the estimate published on February 28.

Global Equities: The US stocks jumped after President Donald Trump declared the coronavirus outbreak a national emergency. The declaration by Trump would free up as much as \$50 billion in additional funding to combat the outbreak.

Indian Economy: India's merchandise exports increased 2.9% to US\$ 27.65 billion in February 2020 over a year ago, while snapping consistent decline for last six straight months. Meanwhile, merchandise imports also moved up 2.5% to US\$ 37.50 billion after continuous decline for last eight straight months. The trade deficit rose marginally by 1.3% to US\$ 9.85 billion in February 2020 from US\$ 9.60 billion in February 2019, while dipped sharply to 12-months low on sequential basis from US\$ 15.17 billion in January 2020. The Union Cabinet has approved to release an additional installment of Dearness Allowance (DA) to Central Government employees and Dearness Relief (DR) to pensioners w.e.f. 01 January 2020. There will be an increase of 4% over the existing rate of 17% of the Basic Pay/Pension, to compensate for price rise.

Equity Markets: The domestic stock market ended with robust gains on Friday, as value buying emerged after the benchmark indices hit lower circuit limit in opening deals. The S&P BSE Sensex surged 1,325.34 points or 4.04% at 34,103.48. The Nifty 50 index spurted 365.05 points or 3.81% at 9,955.20. Trading was halted in early session after benchmark indices dropped by 10% to hit the lower circuit. A sharp rebound in US index futures eased investor concerns. A clarification from the stock market regulator, Securities and Exchange Board of India (SEBI) also calmed investors. SEBI and Stock Exchanges have a robust risk management framework in place which automatically gets triggered in response to movements in the indices as well as individual stocks both in cash and derivatives market, it said.

Corporate News: Wipro announced its global strategic partnership with PLEXIS Healthcare Systems. This partnership will enable a streamlined, efficient, accurate and integrated plan administration solution to support healthcare payers and plan sponsors worldwide. Bharat Forge on Saturday (14 March) said that ratings agency ICRA has revised the company's long term rating to '[ICRA] AA+ (Negative)'. Shares of SBI Cards and Payment Services will debut on the secondary equity market today, 16 March 2020. The company had priced the initial public offer (IPO) at the top end of the Rs 750 to Rs 755 per share price band. The IPO ended on 5 March 2020. The issue received bids for 225.09 crore shares, as against 10.02 crore shares on offer.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(243.0)	(363.7)	27.2
MF(INR cr)	1,036.8	1,089.0	298.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	69,504	53,429	38,093
F&O(INR cr)	807,417	1,683,271	1,428,912

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	57.8	46.5	16.5
NSE VIX	51.5	30.9	16.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,166	5.0 %	(17.0) %	Energy	11,721	4.6 %	(29.1) %
IT	13,539	1.2 %	(14.5) %	Pharma	7,268	4.7 %	(22.5) %
Metals	1,903	5.7 %	(38.6) %	Finance	12,102	5.6 %	(3.2) %
Auto	6,182	2.5 %	(26.5) %	PSU	1,573	10.7 %	(53.5) %
FMCG	26,208	0.5 %	(13.2) %	Real Estate	236	2.4 %	(11.7) %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Vodafone I	6	33.3 %	(68.5) %	UPL	411	(7.4) %	(34.0) %
Bank of Ba	65	15.4 %	(50.8) %	Motherson	64	(6.0) %	(58.4) %
St Bk of I	242	13.8 %	(25.0) %	Pidilite I	1,524	(4.3) %	21.6 %
Tata Steel	327	13.7 %	(39.0) %	Zee Entert	183	(4.1) %	(57.7) %
Power Fin.	102	13.3 %	(14.6) %	Nestle Ind	14,992	(3.7) %	37.3 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
RBA's Heath Speech in Melbourne	16-03-2020	7:30	☐AUD	-	-
Producer & Import Prices (MoM) (FEB)	16-03-2020	13:00	☐CHF	-	0
Domestic Sight Deposits CHF (MAR 13)	16-03-2020	14:30	☐CHF	-	-
New Home Prices (MoM) (FEB)	16-03-2020	7:00	☐CNY	-	0.0027
Rightmove House Prices (YoY) (MAR)	16-03-2020	5:31	☐GBP	-	0.029
Machine Orders (YoY) (JAN)	16-03-2020	5:20	☐JPY	-	(0.035)
Performance Services Index (FEB)	16-03-2020	3:00	☐NZD	-	57.1
Net Migration s.a. (JAN)	16-03-2020	3:15	☐NZD	-	3930
Empire Manufacturing (MAR)	16-03-2020	18:00	☐USD	-	12.9
U.S. to Sell 13-Week Bills	16-03-2020	21:00	☐USD	-	-

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