



16 Apr.2020

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|-------|
| CNX NIFTY | 8,925 | 0.0 % | 8.1 % |
| BSE SENSEX | 30,380 | (1.0) % | 7.5 % |
| CNX BANK | 19,057 | 0.0 % | 4.7 % |
| CNX MIDCAP | 12,534 | 0.0 % | 9.3 % |
| CNX SMALLCAP | 3,850 | 0.0 % | 8.7 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| DOW JONES | 23,504 | (1.9) % | (17.6) % |
| S&P 500 | 2,783 | (2.2) % | (13.8) % |
| FTSE 100 | 5,598 | (3.3) % | (26.4) % |
| HANG SENG | 24,145 | (1.2) % | (15.4) % |
| NIKKEI | 19,550 | (0.5) % | (15.8) % |
| SHANGHAI COMPOSITE | 2,811 | (0.6) % | (8.9) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 75.81 | 0.2 % | 6.5 % |
| EUR/USD | 1.09 | 0.3 % | (2.5) % |
| GBP/USD | 1.25 | 0.9 % | (4.9) % |
| USD/JPY | 107.34 | (1.3) % | (1.2) % |
| USD/AUD | 1.58 | (1.2) % | 10.5 % |
| USD/SGD | 1.42 | (0.0) % | 5.6 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|----------|----------|
| WTI Crude(USD/bbl) | 20 | (10.3) % | (67.1) % |
| Gold(INR/10g) | 40,989 | 0.0 % | 5.1 % |
| Gold Comex(USD/oz) | 1,745 | (0.4) % | 13.1 % |
| SILVER(INR/1Kg) | 36,871 | 0.0 % | (19.9) % |
| Aluminium(USD/MT) | 1,470 | 0.9 % | (17.1) % |
| Copper(USD/MT) | 5,055 | (1.3) % | (18.0) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec India | 8.1 | 0.1 % | (0.0) % |
| 10 Y GSec US 10 | 0.6 | (0.1) % | (1.3) % |

Global Economy: The US industrial production tanked by 5.4% in March after rising by a downwardly revised 0.5% in February. The Fed said that the deep slide in industrial production reflected the biggest monthly decrease since January of 1946. Reflecting the impact of the Covid-19 induced shutdown, the Commerce Department released a report on Wednesday showing a record decline in US retail sales in the month of March. The Commerce Department said retail sales plummeted by 8.7% in March after falling by a revised 0.4% in February. China's central bank reduced its medium-term borrowing cost on Wednesday. The People's Bank of China on Wednesday cut the one-year medium-term lending facility, or MLF, rate to 2.95% from 3.15%. The bank injected CNY 100 billion through the MLF operation. In March, the PBoC had reduced the reserve requirement ratio for qualified banks and the reverse repo rate. German economic recovery would start in the second half of the year following the measures taken by the government to mitigate the downturn caused by the coronavirus pandemic, the economy ministry said in a report released on Wednesday. The economy has been in recession since March and it is expected to continue until the middle of the year. The collapsing global demand, the interruption of supply chains, changes in consumer behavior and uncertainty among investors are having a massive impact on Germany, the ministry reported.

Global Equities: US stocks slipped amid tepid economic releases and lack of buying support.

Indian Economy: The official Wholesale Price Index for 'All Commodities' (Base: 2011-12=100) for the month of March, 2020 declined by 0.90% to 121.1 (provisional) from 122.2 (provisional) for the previous month. The annual rate of inflation, based on monthly WPI, stood at 1.00% (provisional) for the month of March,2020 (over March,2019) as compared to 2.26% (provisional) for the previous month and 3.10% during the corresponding month of the previous year. Build up inflation rate in the financial year so far was 1.00% compared to a build-up rate of 3.10% in the corresponding period of the previous year.

Equity Markets: Key equity benchmarks tumbled on Wednesday, tracking weak global stock markets. The barometer index, the S&P BSE Sensex, fell 310.21 points or 1.01% at 30,379.81. The Nifty 50 index lost 68.55 points or 0.76% at 8,925.30. The Union Home Ministry on Wednesday said select public activities would be allowed across states from 20 April. The ministry said in case a new area is added to the list of containment zones in the country, the relaxed guidelines would be suspended in that area until it turns covid-19 free.

Corporate News: Agri related counters could be in focus. The India Meteorological Department (IMD) announced that it expects monsoon rainfall to be normal this year, media reports noted. Southwest monsoon seasonal (June to September) rainfall over the country as a whole is likely to be normal (96-104%), the IMD said in its first stage Long Range Forecast (LRF). Wipro has reported a 6.3% year-on-year (YoY) fall in its consolidated profit at Rs 2,326.1 crore for the quarter ended March 2020. Bajaj Auto has proposed a 10% pay cut for factory employees if production does not resume on April 21.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (139.2) | 43.8 | 43.8 |
| MF(INR cr) | (1,177.3) | (933.2) | (933.2) |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 4,717 | 30,289 | 30,289 |
| F&O(INR cr) | 1,109,945 | 1,019,981 | 1,019,981 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 37.8 | 45.6 | 45.6 |
| NSE VIX | 49.7 | 52.9 | 52.9 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 19,057 | (2.2) % | 4.7 % | Energy | 11,722 | (0.9) % | 8.8 % |
| IT | 12,703 | 0.8 % | 5.5 % | Pharma | 9,039 | (0.1) % | 28.6 % |
| Metals | 1,753 | 0.8 % | 12.8 % | Finance | 9,239 | (2.8) % | 3.3 % |
| Auto | 5,333 | (1.8) % | 14.5 % | PSU | 1,271 | (0.5) % | (1.0) % |
| FMCG | 29,687 | 4.1 % | 12.6 % | Real Estate | 180 | 1.8 % | 4.6 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Motherson | 71 | 12.7 % | 22.8 % | Kotak Mah. | 1,174 | (6.2) % | (0.7) % |
| UPL | 351 | 7.9 % | 14.7 % | Interglobe | 1,008 | (5.7) % | 0.9 % |
| Pidilite I | 1,475 | 7.1 % | 13.7 % | Hero Motoc | 1,824 | (4.9) % | 11.2 % |
| ACC | 1,138 | 6.6 % | 18.1 % | Bajaj Fin. | 2,182 | (4.6) % | (1.7) % |
| Hind. Unil | 2,488 | 6.0 % | 14.1 % | Cadila Hea | 339 | (4.1) % | 28.5 % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| No Data Found | | | | | |

..... End of Report