



17 Mar.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,197	(7.6) %	(21.2) %
BSE SENSEX	31,390	(8.0) %	(19.2) %
CNX BANK	23,101	(8.2) %	(23.8) %
CNX MIDCAP	13,695	(6.2) %	(25.3) %
CNX SMALLCAP	4,419	(6.4) %	(34.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	20,189	(12.9) %	(29.3) %
S&P 500	2,386	(12.0) %	(26.1) %
FTSE 100	5,151	(4.0) %	(32.3) %
HANG SENG	23,064	(4.0) %	(19.2) %
NIKKEI	17,002	(2.5) %	(26.7) %
SHANGHAI COMPOSITE	2,789	(3.4) %	(9.6) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.79	(0.2) %	3.6 %
EUR/USD	1.11	(1.8) %	(1.0) %
GBP/USD	1.23	(4.7) %	(6.8) %
USD/JPY	107.78	2.9 %	(0.8) %
USD/AUD	1.62	5.3 %	13.4 %
USD/SGD	1.42	1.7 %	5.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	29	(9.5) %	(53.1) %
Gold(INR/10g)	39,867	(4.8) %	2.2 %
Gold Comex(USD/oz)	1,511	(1.6) %	(2.0) %
SILVER(INR/1Kg)	35,726	(16.9) %	(22.4) %
Aluminium(USD/MT)	1,641	(2.2) %	(7.4) %
Copper(USD/MT)	5,211	(5.8) %	(15.5) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	0.3 %	(1.2) %

**Global Economy:** Leading central banks, led by the US Federal Reserve, decided on Sunday, to provide monetary stimulus to the world economy by boosting liquidity amid a global financial market crash as the coronavirus, or Covid-19, spreads hampering human activity and raising fears of a severe global recession. The US Federal Reserve, the Bank of Canada, the Bank of England, the Bank of Japan, the European Central Bank and the Swiss National Bank announced a coordinated action to enhance the provision of global US dollar liquidity. China's retail sales declined 20.5% year on year in the first two months of this year as the novel coronavirus outbreak took its toll on the economy, official data showed Monday. Sales of consumer goods totaled 5.2 trillion yuan in the two months, according to the National Bureau of Statistics. China's fixed-asset investment (FAI) also dropped 24.5% year on year to 3.3 trillion yuan in the first two months of the year. China's industrial output also contracted at the sharpest pace in nearly three decades. Industrial output fell by 13.5% in January-February from the same period a year earlier.

**Global Equities:** Markets tumbled as the US Federal Reserve slashed its benchmark interest rate to zero and launched a massive quantitative easing program in an emergency move on Sunday. Following the Fed decision, DOW tanked 13%.

**Indian Economy:** The official Wholesale Price Index (WPI) for 'All Commodities' (Base: 2011-12=100) for the month of February, 2020 declined by 0.6% to 122.2 (provisional) from 122.9 (provisional) for the previous month. The annual rate of inflation, based on monthly WPI, stood at 2.26% (provisional) for the month of February, 2020 (over February, 2019) as compared to 3.1% (provisional) for the previous month and 2.93% during the corresponding month of the previous year. RBI announced a slew of measures including Rs 1 lakh crore LTROs to ease liquidity amid Coronavirus scare.

**Equity Markets:** The local market resumed sell-off on Monday after a day's halt as investors respond to a rapidly escalating economic hit from the coronavirus and a massive emergency move by the US Federal Reserve to ease policy. The barometer index, the S&P BSE Sensex, slumped 2713.41 points or 7.96% at 31,390.07. The Nifty 50 index crashed 756.10 points or 7.60% at 9,199.10.

**Corporate News:** Grasim Industries informed that the Competition Commission of India (CCI) has passed an order imposing a penalty of Rs 301.61 crore on Grasim Industries in respect of its domestic Man-Made Fibre turnover. While the company is yet to receive the order of the CCI, it believes that on merits it has sufficient grounds for an appeal. Delta Corp said the casinos operated by the company and its subsidiaries in Goa will remain closed until 31 March, 2020, and will be reviewed thereafter for further course of action. CSB Bank said the company's board has approved the proposal to merge 19 branches of the bank with the nearest branches of the Bank, with the intention of reducing overall costs and improve productivity.



### 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)	52,501	53,336	38,154
F&O(INR cr)	645,831	1,579,527	1,425,594

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	82.7	50.1	16.7
NSE VIX	58.9	33.7	17.0

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,101	(8.2) %	(23.8) %	Energy	11,017	(6.0) %	(33.4) %
IT	12,451	(8.0) %	(21.4) %	Pharma	6,959	(4.2) %	(25.8) %
Metals	1,731	(9.1) %	(44.2) %	Finance	11,123	(8.1) %	(11.0) %
Auto	5,844	(5.5) %	(30.6) %	PSU	1,497	(4.8) %	(55.8) %
FMCG	24,708	(5.7) %	(18.2) %	Real Estate	216	(8.4) %	(19.1) %

### 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>
Yes Bank	37	45.2 %	(86.6) %	IndusInd B	664	(17.4) %	(61.9) %
Motherson	67	4.5 %	(56.6) %	Bandhan Ba	275	(16.2) %	(48.2) %
H P C L	205	3.6 %	(27.8) %	L&T Fin.Ho	71	(14.9) %	(53.3) %
Vodafone I	6	1.8 %	(67.9) %	Piramal En	880	(14.4) %	(66.5) %
				JSW Steel	186	(13.4) %	(36.4) %

### EVENTS CALENDAR

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

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