



17 Mar.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,910	(0.1) %	80.6 %
BSE SENSEX	50,364	(0.1) %	78.2 %
CNX BANK	34,805	(1.1) %	91.1 %
CNX MIDCAP	24,048	0.4 %	109.6 %
CNX SMALLCAP	8,441	0.3 %	138.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	32,826	(0.4) %	7.3 %
S&P 500	3,963	(0.2) %	5.5 %
FTSE 100	6,804	0.8 %	3.5 %
HANG SENG	29,028	0.7 %	5.7 %
NIKKEI	29,921	0.5 %	9.8 %
SHANGHAI COMPOSITE	3,447	0.8 %	(1.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.61	0.0 %	(0.5) %
EUR/USD	1.19	(0.1) %	(2.6) %
GBP/USD	1.39	(0.3) %	1.9 %
USD/JPY	109.04	0.5 %	5.7 %
USD/AUD	1.29	0.1 %	(0.6) %
USD/SGD	1.35	0.3 %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	(0.6) %	37.8 %
Gold(INR/10g)	44,740	0.1 %	(12.3) %
Gold Comex(USD/oz)	1,732	0.4 %	(11.1) %
SILVER(INR/1Kg)	66,823	(0.0) %	(3.0) %
Aluminium(USD/MT)	2,185	2.1 %	8.5 %
Copper(USD/MT)	9,148	1.0 %	15.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	1.6 %	0.7 %

Global Economy: The US NAHB/Wells Fargo Housing Market Index fell to 82 in March after inching up to 84 in February. The US Commerce Department said business inventories rose by 0.3% in January after climbing by an upwardly revised 0.8% in December. The US Fed said industrial production tumbled by 2.2% in February after jumping by an upwardly revised 1.1% in January. The Commerce Department said retail sales plunged by 3% in February after soaring by an upwardly revised 7.6% in January. The German ZEW headline index for March showed that the Economic Sentiment Index rose sharply to 76.6 versus 71.2 in last month. While the sub-index Current Conditions figure came in at -61.0 in March against -67.2 previously. The Eurozone ZEW Economic Sentiment for March spiked to 74.0 after coming in at 69.6 in last month. Japan industrial production increased a seasonally adjusted 4.3% month-on-month in January, the Ministry of Economy, Trade and Industry said on Tuesday. In the initial estimate, output rose 4.2%. Shipments grew 3.2% monthly in January, as estimated. On a yearly basis, industrial production decreased 5.2% in January. According to the initial estimate, output fell 5.3%. Australia house price index was up 3% on quarter in the fourth quarter of 2020, the Australian Bureau of Statistics said on Tuesday, following the 0.8% increase in the previous three months. On a yearly basis, the house price index gained 3.6%, easing from 4.5% in the three months prior.

Global Equities: The US stocks saw choppy action amid a raft of economic cues. Market is focusing on the US Fed meeting which will conclude on Wednesday.

Indian Economy: Union Cabinet has cleared the setting up of a Development Finance Institution (DFI) for financing long term infrastructure and development projects of the country, said Finance Minister Nirmala Sitharaman yesterday. During Budget 2021, it was stated that a national bank will be set up to fund infrastructure and developmental activities. The Government of India (GoI) has announced the Sale (Re-issue) of (i) 5.15% Government Security, 2025' for a notified amount of Rs 11,000 crore (nominal) through price based auction, (ii) '5.85% Government Security, 2030' for a notified amount of Rs 11,000 crore (nominal) through price based auction, and (iii) '6.76% Government Security, 2061' for a notified amount of Rs 7,000 crore (nominal) through price based auction.

Equity Markets: The benchmark indices ended a volatile session to close on a flat note on Tuesday. The Nifty managed to close above the 14,900 mark after slipping below that level in intraday. Barring IT and FMCG stocks, selling was seen wide spread.

Corporate News: Power stocks will be in focus. India added 9.7 gigawatt (GW) of power generation capacity during this financial year till February 28, 2021, Parliament was informed on Tuesday. Metal stocks could ease as global Copper futures slipped nearly 2% yesterday. Shriram City Union Finance said that the Banking and Securities Management Committee of the company on March 16, 2021, approved the issue of secured rated listed redeemable principal-protected market-linked (PP-MLD) non-convertible debentures (NCDs) of the face value of Rs 10,00,000 each, aggregating up to 5,000 NCDs amounting to Rs 500 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(132.3)	144.7	155.6
MF(INR cr)	(864.4)	(312.2)	(541.9)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	62,697	73,725	62,913
F&O(INR cr)	3,456,033	4,323,615	2,501,920

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	20.0	24.1	28.0
NSE VIX	20.2	22.9	25.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,805	(1.1) %	91.1 %	Energy	19,293	(0.2) %	79.1 %
IT	26,364	1.3 %	118.9 %	Pharma	12,013	(0.1) %	71.0 %
Metals	3,847	(0.8) %	147.6 %	Finance	16,167	(0.8) %	80.8 %
Auto	10,351	0.2 %	122.2 %	PSU	2,285	(1.3) %	78.1 %
FMCG	33,352	0.9 %	26.5 %	Real Estate	346	(0.6) %	101.0 %

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>
General In	226	7.9 %	114.4 %	Punjab Nat	40	(2.5) %	30.7 %
Asian Pain	2,469	4.8 %	54.0 %	Tata Steel	724	(1.7) %	171.8 %
Oracle Fin	3,258	3.4 %	69.6 %	Cipla	792	(1.6) %	91.5 %
Indus Towe	262	3.0 %	69.2 %	Larsen & T	1,462	(1.5) %	88.8 %
Dr Reddy's	4,450	2.5 %	43.8 %	B P C L	454	(1.5) %	49.8 %

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