



17 Apr.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,323	3.7 %	13.0 %
BSE SENSEX	30,603	0.7 %	11.7 %
CNX BANK	20,395	5.1 %	12.0 %
CNX MIDCAP	13,129	2.9 %	14.5 %
CNX SMALLCAP	4,090	3.3 %	15.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,538	0.1 %	(17.5) %
S&P 500	2,800	0.6 %	(13.3) %
FTSE 100	5,628	0.6 %	(26.0) %
HANG SENG	24,006	(0.6) %	(15.9) %
NIKKEI	19,290	(1.3) %	(16.9) %
SHANGHAI COMPOSITE	2,820	0.3 %	(8.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	76.22	0.7 %	7.0 %
EUR/USD	1.09	(0.5) %	(3.1) %
GBP/USD	1.25	(0.2) %	(5.4) %
USD/JPY	107.76	(0.1) %	(0.8) %
USD/AUD	1.59	0.9 %	11.3 %
USD/SGD	1.43	0.8 %	6.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	20	0.0 %	(67.5) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,725	(1.1) %	11.8 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,476	0.4 %	(16.7) %
Copper(USD/MT)	5,099	0.9 %	(17.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	0.0 %	(1.3) %

Global Economy: The Federal Reserve Bank of Philadelphia released a report on Thursday showing a substantial contraction in regional manufacturing activity in the month of April. The Philly Fed said its diffusion index for current activity plunged to a negative 56.6 in April from a negative 12.7 in March. US Labor Department said initial jobless claims dropped to 5.245 million, a decrease of 1.370 million from the previous week's revised level of 6.615 million. China's house prices increased in March driven by pent-up demand after the lockdown, the National Bureau of Statistics reported Thursday. In March, house prices increased in 38 cities out of 70 cities surveyed by the NBS. House prices advanced around 1% on a monthly basis in March after stalling in February. Eurozone industrial production fell by 0.1% month-on-month in February, reversing a 2.3% rise in January, data from Eurostat revealed Thursday. Production dropped ahead of COVID-19 containment measures began to be widely introduced among member countries.

Global Equities: US stocks stayed supported. The Nasdaq recorded a particularly strong gain on the day, reflecting strength among tech stocks.

Indian Economy: India's exports in March 2020 were USD 21.41 billion, as compared to USD 32.72 billion in March 2019, exhibiting a negative growth of (-) 34.57 per cent. In Rupee terms, exports were Rs. 1,59,157.98 crore in March 2020, as compared to Rs. 2,27,318.25 crore in March 2019, registering a negative growth of (-) 29.98 per cent. The decline in exports has been mainly due to the ongoing global slowdown, which got aggravated due to the current Covid-19 crisis. The latter resulted in large scale disruptions in supply chains and demand resulting in cancellation of orders. Domestic imports in March 2020 were USD 31.16 billion (Rs.2,31,710.92 crore), which was 28.72 per cent lower in Dollar terms and 23.72 per cent lower in Rupee terms over imports of USD 43.72 billion (Rs 3,03,753.76 crore) in March 2019. As per the data released by the Reserve Bank of India, According to the SBI Ecowrap report, the extension of the lockdown would result in economic loss of Rs 21.1 lakh crore or 6% of the nominal Gross Value Added. India's GDP growth may slide to 1.1% in the current financial year, on account of the impact of coronavirus (COVID-19) outbreak on the economy, noted SBI.

Equity Markets: Key domestic indices ended with decent gains on Thursday, snapping losses in the past two sessions. Gains were boosted by the media reports suggesting that the government is working on a fiscal package and is closely studying the impact of Covid-19 on various industries. The barometer S&P BSE Sensex rose 222.80 points or 0.73% at 30,602.61. The Nifty 50 index added 67.50 points or 0.76% at 8,992.80.

Corporate News: On a consolidated basis, TCS reported 0.85% fall in net profit to Rs 8,049 crore on 0.03% rise in total income to Rs 40,684 crore in Q4 March 2020 over Q3 December 2019. Mahindra & Mahindra (M&M) said that its step-down wholly owned subsidiary Mahindra Renewables (MRPL) has sold 1,20,80,000 equity shares of Rs. 10 each held by MRPL in Divine Solren (DSPL) aggregating to 100% of the paid-up Equity Share Capital of DSPL to CLP India, for a consideration of Rs 124.47 crore. JK Lakshmi Cement said that on the basis of permission received from the Government of Gujarat, the company's grinding units at Kalol and Surat have become partially operational. Sudarshan Chemical Industries said that the necessary permissions have been received to restart production at manufacturing facility located at Mahad. Indian Rupee dropped sharply on domestic growth concerns as the US dollar stayed firm overseas. The INR closed at 76.87 per US dollar, down 43 paise on the day.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	119.2	56.3	56.3
MF(INR cr)	(789.5)	(909.3)	(909.3)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	52,108	33,017	33,017
F&O(INR cr)	1,955,640	1,136,938	1,136,938

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	40.8	45.2	45.2
NSE VIX	46.1	52.1	52.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,400	1.8 %	6.5 %	Energy	11,979	2.2 %	11.2 %
IT	12,464	(1.9) %	3.5 %	Pharma	9,199	1.8 %	30.9 %
Metals	1,780	1.5 %	14.6 %	Finance	9,393	1.7 %	5.0 %
Auto	5,394	1.1 %	15.8 %	PSU	1,289	1.4 %	0.5 %
FMCG	29,512	(0.6) %	12.0 %	Real Estate	181	0.8 %	5.3 %

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>
Indiabulls	106	15.9 %	7.0 %	DLF	134	(4.5) %	1.1 %
Motherson	82	14.5 %	40.6 %	Piramal En	895	(4.0) %	(4.4) %
L&T Fin.Ho	61	13.5 %	21.4 %	HCL Techno	460	(4.0) %	11.2 %
Bandhan Ba	198	6.1 %	1.7 %	Tech Mahin	518	(3.9) %	1.3 %
Aurobindo	545	5.8 %	38.8 %	Kotak Mah.	1,131	(3.7) %	(4.3) %

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					

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