



18 Mar.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,721	(1.3) %	78.4 %
BSE SENSEX	49,802	(1.1) %	76.2 %
CNX BANK	34,229	(1.7) %	88.0 %
CNX MIDCAP	23,452	(2.5) %	104.4 %
CNX SMALLCAP	8,255	(2.2) %	133.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,015	0.6 %	7.9 %
S&P 500	3,974	0.3 %	5.8 %
FTSE 100	6,763	(0.6) %	2.9 %
HANG SENG	29,034	0.0 %	5.7 %
NIKKEI	29,914	(0.0) %	9.7 %
SHANGHAI COMPOSITE	3,446	(0.0) %	(1.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.60	(0.0) %	(0.5) %
EUR/USD	1.19	(0.1) %	(2.7) %
GBP/USD	1.39	(0.0) %	1.9 %
USD/JPY	109.15	0.1 %	5.8 %
USD/AUD	1.29	0.2 %	(0.5) %
USD/SGD	1.35	0.0 %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	(1.2) %	36.1 %
Gold(INR/10g)	44,763	0.1 %	(12.3) %
Gold Comex(USD/oz)	1,733	0.1 %	(11.1) %
SILVER(INR/1Kg)	66,595	(0.3) %	(3.3) %
Aluminium(USD/MT)	2,175	(0.5) %	8.0 %
Copper(USD/MT)	8,966	(2.0) %	13.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	0.0 %	0.7 %

Global Economy: The US Federal Reserve still expects to keep interest rates at near-zero levels through 2023. The Fed maintained the target range for the federal funds rate at zero to 0.25% and reiterated it plans to continue purchasing bonds at a rate of at least \$120 billion per month until substantial further progress has been made toward its policy goals. The Fed said members now expect US GDP to rise 6.5% in 2021 compared to the 4.2% growth seen in December. The US housing starts fell by 10.3% to an annual rate of 1.421 million in February after slumping by 5.1% to a revised rate of 1.584 million in January. Europe's new car registrations recorded another double-digit decline in February as the Covid-19 containment measures and uncertainty continue to weigh on demand, the European Automobile Manufacturers' Association, or ACEA, reported Wednesday. New car registrations dropped 19.3% year-on-year in February following a 24% fall in January. The number of vehicles registered across the EU region totaled 771,486 units, the lowest February level on record since 2013. Italy posted the smallest drop of 12.3%, while Germany reported an annual decrease of 19% and France registered 20.9% fall. Spain's registrations tumbled 38.4% in February. Japan merchandise trade surplus came in at 217.381 billion yen in February, the Ministry of Finance said on Wednesday, down 80.5% on year, following the downwardly revised 325.4 billion yen deficit in January (originally -323.9 billion yen). Exports dropped 4.5% on year to 6.038 trillion yen, after rising 6.4% in the previous month. Imports jumped an annual 11.8% to 5.820 trillion yen following the 9.5% contraction a month earlier.

Global Equities: The US stocks edged up following Fed statement with DOW hitting record highs of 33K.

Indian Economy: Union Minister of Chemicals & Fertilizers Shri D.V. Sadananda Gowda stated that the Indian chemicals and petrochemicals industry is growing to new heights, and informed that an investment of Rs 8 lakh crore is anticipated in the sector by 2025. Gowda added that the growth in the chemical and petrochemicals industry is also contributing to the Prime Minister's vision of Atmanirbhar Bharat. He informed that Government has launched 12 PLI scheme for different sectors which will directly or indirectly benefit the chemicals sector. He also stated that the Government is prioritising the sector and in the Budget 2021-21, the import duty on Naphtha has been reduced from 4.0% to 2.5%.

Equity Markets: Domestic stock market ended with heavy losses on Wednesday amid a broad based selloff. The Nifty managed to close above the 14,700 mark after slipping below that level in late trade. All the sectoral indices on the NSE ended in the red.

Corporate News: Aviation stocks could be in focus. Around 78.27 lakh domestic passengers travelled by air in February 2021 which is 36.71% lower than the corresponding period last year, Indian aviation regulator DGCA said on Wednesday. Asset quality of domestic banks, which saw some improvement in the second half of 2020, is likely to worsen during the first six months of 2021, according to the 12th round of bankers' survey carried out by FICCI-IBA between July and December 2020. Automakers will have to mandatorily recall a vehicle if a certain number of vehicle owners file a complaint against it on a vehicle recall website to be set up by the government. The road transport and highways ministry on Wednesday notified rules for mandatory recall of defective vehicles by the auto manufacturers to strengthen the cause of consumer safety and reduce road accidents in the country. The rules will come into effect on April 1.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	1,001.3	222.5	159.2
MF(INR cr)	(153.9)	(11.2)	(522.2)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	67,932	73,243	62,934
F&O(INR cr)	4,245,096	4,317,072	2,509,183

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.8	23.7	27.9
NSE VIX	20.2	22.7	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	34,229	(1.7) %	88.0 %	Energy	18,694	(3.1) %	73.5 %
IT	26,184	(0.7) %	117.4 %	Pharma	11,788	(1.9) %	67.8 %
Metals	3,753	(2.5) %	141.6 %	Finance	15,977	(1.2) %	78.7 %
Auto	10,159	(1.9) %	118.1 %	PSU	2,199	(3.8) %	71.4 %
FMCG	33,195	(0.5) %	25.9 %	Real Estate	336	(3.0) %	95.1 %

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>
ITC	211	1.3 %	26.6 %	Bank of Ba	75	(5.1) %	46.0 %
Interglobe	1,696	0.8 %	69.7 %	O N G C	109	(5.0) %	66.3 %
General In	227	0.7 %	115.9 %	Adani Tran	743	(4.8) %	292.2 %
Muthoot Fi	1,279	0.4 %	111.6 %	B P C L	432	(4.8) %	42.6 %
Infosys	1,387	0.2 %	130.1 %	Adani Gree	1,164	(4.5) %	661.5 %

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					

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