



19 Mar.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	8,469	(5.6) %	(27.4) %
BSE SENSEX	28,870	(5.6) %	(25.7) %
CNX BANK	20,580	(7.1) %	(32.1) %
CNX MIDCAP	12,595	(5.7) %	(31.3) %
CNX SMALLCAP	4,019	(6.3) %	(40.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	19,899	(6.3) %	(30.3) %
S&P 500	2,398	(5.2) %	(25.8) %
FTSE 100	5,097	(3.7) %	(33.0) %
HANG SENG	22,292	(4.2) %	(21.9) %
NIKKEI	16,727	(1.7) %	(27.9) %
SHANGHAI COMPOSITE	2,729	(1.8) %	(11.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.98	0.3 %	3.9 %
EUR/USD	1.11	(0.4) %	(1.3) %
GBP/USD	1.21	(1.1) %	(7.9) %
USD/JPY	107.01	(0.7) %	(1.5) %
USD/AUD	1.66	2.3 %	16.1 %
USD/SGD	1.43	0.8 %	5.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	20	(24.4) %	(66.7) %
Gold(INR/10g)	40,649	2.3 %	4.2 %
Gold Comex(USD/oz)	1,490	(3.2) %	(3.4) %
SILVER(INR/1Kg)	35,889	2.9 %	(22.1) %
Aluminium(USD/MT)	1,666	2.3 %	(6.0) %
Copper(USD/MT)	5,320	2.2 %	(13.7) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.2	0.1 %	(0.8) %

Global Economy: European Automobile Manufacturers' Association, or ACEA, showed Passenger car sales decreased 7.4% year-on-year to 957,052 units in February. Sales were down 7.5% in January. Among member states, Germany logged the biggest fall of 10.8 percent in February, followed by an 8.8% decrease in Italy and a 6% drop in Spain. France's passenger car registrations declined 2.7%. From January to February, total registrations of new cars in the European Union were 7.4% lower than in the same period the year before. Japan posted a merchandise trade surplus of 1,109.845 billion yen in February following the 1,312.6 billion yen deficit in January, the Ministry of Finance said. Exports were down 1% on year after falling 2.6% in the previous month. Imports fell an annual 14% after a 3.6% decline a month earlier. Australia's leading index signalled that the economy is entering an extremely difficult coronavirus period, data published by Westpac showed on Wednesday. The Westpac- Melbourne Institute leading index, which indicates the likely pace of economic activity relative to trend three to nine months into the future, fell to -0.96 percent in February from -0.49 percent in January.

Global Equities: The US and European stocks fell sharply amid continued selling pressure.

Indian Economy: S&P Global Ratings on Wednesday lowered India's economic growth forecast to 5.2% for 2020, saying the global economy is entering a recession amid the coronavirus pandemic, according to media reports. The agency had earlier projected a growth rate of 5.7% during the 2020 calendar. Union Health Ministry, on Wednesday, confirmed that the total number of coronavirus cases in India has jumped to 147. The Reserve Bank of India has introduced a new set of operational guidelines to strengthen the governance and functioning of payment aggregators (PA) and payment gateways (PG). The guideline details governance, shareholding, technology, security and operational requirements all payment aggregators and gateways need to comply with.

Equity Markets: The local market ended with massive losses on Wednesday after the Supreme Court (SC) on Wednesday made it clear that there could not be another attempt at calculating the adjusted gross revenue (AGR) dues of telecom firms. Banks shares slumped as a collapse of a telecom operator could add to lenders' bad loan pile. The barometer index, S&P BSE Sensex closed 1709.58 points or 5.59% lower at 28,869.51 as per provisional closing data. The Nifty 50 index closed 425.55 points or 4.75% lower at 8,541.50 as per provisional closing data.

Corporate News: Local oil marketing companies will be in focus as WTI Crude oil futures slumped under \$25 per barrel. Prices fell for a third session on Wednesday with US crude futures tumbling to a 17-year low as the outlook for fuel demand took a massive hit with travel and social lockdowns triggered by the coronavirus epidemic. Wipro announced the launch of its Microsoft Business Unit. The unit will focus on the development and evangelization of solutions leveraging Microsoft's enterprise cloud services. Yes Bank will be in focus. The Reserve Bank of India (RBI) on Wednesday withdrew its moratorium imposed on the private lender, allowing restoration of all banking operations. This came after a consortium of eight public and private banks, led by State Bank of India, agreed to infuse capital into Yes Bank to rescue it under the restructuring plan proposed by the government and RBI. Karur Vysya Bank announced the launch of its Precious Metals Business. This new business has been launched after ensuring the highest quality risk management.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(494.8)	(449.7)	18.3
MF(INR cr)	1,355.8	1,314.4	322.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	61,412	53,578	38,294
F&O(INR cr)	1,010,921	1,466,831	1,421,205

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	76.5	54.4	17.2
NSE VIX	64.0	38.6	17.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	20,580	(7.1) %	(32.1) %	Energy	10,467	(4.5) %	(36.7) %
IT	11,753	(2.9) %	(25.8) %	Pharma	6,706	(3.9) %	(28.5) %
Metals	1,664	(2.7) %	(46.4) %	Finance	9,800	(7.7) %	(21.6) %
Auto	5,517	(5.0) %	(34.4) %	PSU	1,481	(0.7) %	(56.3) %
FMCG	24,187	(3.0) %	(19.9) %	Real Estate	198	(6.3) %	(26.0) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Zee Entert	164	23.3 %	(62.0) %	Vodafone I	3	(35.1) %	(82.3) %
O N G C	68	13.6 %	(56.7) %	IndusInd B	461	(23.7) %	(73.6) %
Adani Tran	192	8.3 %	(12.7) %	Bharti Inf	150	(22.9) %	(52.3) %
New India	90	7.9 %	(52.1) %	Indiabulls	135	(15.4) %	(84.0) %
NHPC Ltd	19	6.3 %	(22.8) %	SBI Life I	596	(13.2) %	(0.3) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AUD Employment Change (FEB)	19-03-2020	6:00	☐AUD	-	-
CHF SNB publishes 2019 sustainability report	19-03-2020	11:55	☐CHF	-	-
CHF Exports (MoM) (FEB)	19-03-2020	12:30	☐CHF	-	0.017
CHF SNB Policy Rate (MAR 19)	19-03-2020	14:00	☐CHF	-	(0.0075)
CNY Swift Global Payments CNY (FEB)	19-03-2020	6:30	☐CNY	-	0.0165
EUR Euro-Zone Construction Output s.a. (MoM) (JAN)	19-03-2020	15:30	EUR	-	(0.031)
JPY All Industry Activity Index (MoM) (JAN)	19-03-2020	10:00	☐JPY	-	0
JPY National Consumer Price Index (YoY) (FEB)	19-03-2020	5:00	☐JPY	-	0.007
JPY Foreign Buying Japan Bonds (MAR 13)	19-03-2020	5:20	☐JPY	-	-
NZD Gross Domestic Product (YoY) (4Q)	19-03-2020	3:15	☐NZD	-	0.023
USD Continuing Claims (MAR 7)	19-03-2020	18:00	☐USD	-	-
USD Leading Index (FEB)	19-03-2020	19:30	☐USD	-	0.008
USD EIA Natural Gas Storage Change (MAR 13)	19-03-2020	20:00	☐USD	-	(48)
USD U.S. to Sell 4-Week Bills	19-03-2020	21:00	☐USD	-	-
USD U.S. to Sell 10-Year TIPS Reopening	19-03-2020	22:30	☐USD	-	-

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