



19 Mar.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,558	(1.1) %	76.4 %
BSE SENSEX	49,217	(1.2) %	74.1 %
CNX BANK	33,857	(1.1) %	85.9 %
CNX MIDCAP	23,130	(1.4) %	101.6 %
CNX SMALLCAP	8,149	(1.3) %	130.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	32,862	(0.5) %	7.4 %
S&P 500	3,915	(1.5) %	4.2 %
FTSE 100	6,780	0.3 %	3.2 %
HANG SENG	29,406	1.3 %	7.0 %
NIKKEI	30,217	1.0 %	10.9 %
SHANGHAI COMPOSITE	3,463	0.5 %	(1.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.55	(0.1) %	(0.6) %
EUR/USD	1.19	(0.1) %	(2.8) %
GBP/USD	1.39	(0.3) %	1.7 %
USD/JPY	109.08	(0.1) %	5.7 %
USD/AUD	1.29	0.0 %	(0.5) %
USD/SGD	1.35	(0.0) %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	(0.3) %	35.7 %
Gold(INR/10g)	44,706	(0.1) %	(12.4) %
Gold Comex(USD/oz)	1,753	1.2 %	(10.1) %
SILVER(INR/1Kg)	66,917	0.5 %	(2.8) %
Aluminium(USD/MT)	2,203	1.3 %	9.4 %
Copper(USD/MT)	9,027	0.7 %	14.0 %

FIXED INCOME

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

Global Economy: The UN Conference on Trade and Development (UNCTAD) said the global economy is set to grow by 4.7% this year, faster than the 4.3% predicted in September 2020. A reading on Philadelphia-area manufacturing activity spiked to a nearly 50-year high in the month of March, the Federal Reserve Bank of Philadelphia revealed in a report on Thursday. The Philly Fed said its diffusion index for current activity soared to 51.8 in March from 23.1 in February, with a positive reading indicating growth in regional manufacturing activity. The US initial jobless claims surged to 770,000, an increase of 45,000 from the previous week's revised level of 725,000. The euro area trade surplus decreased in January from the previous month on weak exports, Eurostat reported Thursday. The trade surplus fell to a seasonally adjusted EUR 24.2 billion from EUR 27.5 billion in December. Exports were down 2.8% month-on-month in January and imports dropped 1.3%. Eurozone consumer prices increased for the second straight month in February, final data from Eurostat showed on Thursday. The consumer price index rose 0.9% year-on-year, the same rate as in January. A year earlier, the rate was 1.2%. Bank of England decided to keep its benchmark rate and quantitative easing unchanged on Thursday as members were not much concerned about higher gilt yields. The nine-member Monetary Policy Committee, headed by Governor Andrew Bailey, voted to hold the interest rate at 0.10 percent and the quantitative easing at GBP 895 billion in the latest policy meeting. The unemployment rate in Australia came in at a seasonally adjusted 5.8% in February, the Australian Bureau of Statistics said on Thursday. That down sharply from 6.4% in January.

Global Equities: The US stocks retreated after recent spurt as tech counters were hammered. Rising yield weighed on the sentiments.

Indian Economy: India's economy, estimated to contract by 6.9% in 2020 due to the coronavirus pandemic, is forecast to record a stronger recovery in 2021 and grow by 5%, according to a UN report which said the country's current fiscal year budget points to a shift towards demand-side stimulus, with an uptick in public investment. The index of mineral production of mining and quarrying sector for the month of January, 2021 (Base: 2011-12=100) at 119.7, was 3.7% lower as compared to the level in the month of January, 2020. The cumulative growth for the period April- January, 2020-21 over the corresponding period of previous year has been (-) 10.4%.

Equity Markets: The equity barometers extended their losing run to fifth consecutive trading session on Thursday. The Nifty closed above the 14,500 mark after hitting the day's low of 14,478.60 in mid-afternoon trade. Selling was broad based with IT, pharma and bank stocks losing the most. A combination of increasing domestic COVID-19 cases, high crude oil prices and rising US bond yields hurt investors' sentiment.

Corporate News: GAIL India and Ranchi Municipal Corporation has signed concession agreement for setting up compressed biogas plant in Ranchi. Oil marketing companies' shares could be in focus following a more than 8% crash in world crude oil futures yesterday. Hathway Cable & Datacom: Hathway Cable & Datacom has entered into an agreement for disposing its entire 50% i.e. 5,000 equity shares having face value of Rs 10 each of Net 9 Online Hathway, a joint venture company, on March 18.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	445.3	241.1	160.4
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)	67,637	72,811	62,954
F&O(INR cr)	9,256,631	4,697,038	2,537,181

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.2	23.4	27.9
NSE VIX	20.1	22.5	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	33,857	(1.1) %	85.9 %	Energy	18,404	(1.5) %	70.9 %
IT	25,373	(3.1) %	110.6 %	Pharma	11,514	(2.3) %	63.9 %
Metals	3,754	0.0 %	141.7 %	Finance	15,849	(0.8) %	77.2 %
Auto	10,144	(0.1) %	117.8 %	PSU	2,156	(2.0) %	68.0 %
FMCG	33,223	0.1 %	26.0 %	Real Estate	331	(1.5) %	92.2 %

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>
Adani Tran	771	3.8 %	307.2 %	Info Edg.(4,480	(5.9) %	122.5 %
ITC	218	3.3 %	30.8 %	HCL Techno	948	(4.0) %	129.2 %
Bajaj Auto	3,665	2.7 %	78.7 %	Bank of Ba	72	(3.9) %	40.4 %
SBI Cards	1,000	2.3 %	64.5 %	Aurobindo	808	(3.7) %	105.9 %
Bajaj Hold	3,538	1.8 %	101.6 %	Infosys	1,337	(3.6) %	121.8 %

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					

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