



20 Apr.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,267	0.0 %	12.3 %
BSE SENSEX	31,589	3.2 %	11.8 %
CNX BANK	20,681	0.0 %	13.6 %
CNX MIDCAP	13,047	0.0 %	13.7 %
CNX SMALLCAP	4,091	0.0 %	15.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,242	3.0 %	(15.1) %
S&P 500	2,875	2.7 %	(11.0) %
FTSE 100	5,787	2.8 %	(23.9) %
HANG SENG	24,380	1.6 %	(14.6) %
NIKKEI	19,897	3.2 %	(14.3) %
SHANGHAI COMPOSITE	2,838	0.7 %	(8.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.86	(0.5) %	6.5 %
EUR/USD	1.09	(0.1) %	(3.2) %
GBP/USD	1.25	0.1 %	(5.3) %
USD/JPY	107.66	(0.1) %	(0.9) %
USD/AUD	1.57	(0.8) %	10.4 %
USD/SGD	1.42	(0.3) %	5.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	18	(8.1) %	(70.1) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,695	(1.7) %	9.9 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,483	0.4 %	(16.3) %
Copper(USD/MT)	5,176	1.5 %	(16.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.6	(0.0) %	(1.3) %

Global Economy: A report released by the Conference Board on Friday showed its index of leading US economic indicators registered the largest decline in its 60-year history in the month of March. The Conference Board said its leading economic index plunged by 6.7% in March after dipping by a revised 0.2% in February. China's gross domestic product slipped by a seasonally adjusted 9.8% on quarter in the first quarter of 2020, the National Bureau of Statistics said on Friday. This followed a 1.5% gain in the three months prior. On a yearly basis, GDP contracted 6.8% following the 6% increase in the previous three months. China's fixed asset investment tumbled an annual 16.1% in March following the 24.5% plunge in February. Industrial production dipped 1.1% on year, after dropping 13.5% in the previous month. Retail sales crashed 15.8% on year after sliding 20.5% a month earlier. Eurozone inflation slowed on a notable fall in energy prices, final data from Eurostat showed Friday. Inflation eased to 0.7% from 1.2% in February. The rate came in line with the estimate published on March 31. Headline inflation remains well below the European Central Bank's target of "below, but close to 2%."

Global Equities: US stocks jumped on Friday as on President Donald Trump's plans for a gradual re-opening of the US economy. DOW soared 3%.

Indian Economy: Reserve Bank Of India (RBI) cut its Reverse repo rate cut by 25 basis points and also announced various others measures like LTRO to boost liquidity in the system. RBI is aiming to maintain liquidity in the system, to facilitate and incentivise bank credit flows, to ease financial stress and to enable formal working of markets. RBI noted that economic activities have come to a standstill during lockdown. A Rs 50,000 crore special finance facility is to be provided to financial institutions such as Nabard, Sidbi and NHB. RBI would conduct TLTRO 2.0 operations of Rs 50,000 crore. The LCR requirement of scheduled commercial banks being brought down from 100% to 80% with immediate effect. India is expected to post a sharp turnaround and resume its pre-COVID pre-slowdown trajectory by growing at 7.4% in 2021-22, noted the RBI Governor Shaktikanta Das today. Over the last three weeks, there have been a few data releases on domestic developments, but they are too disjointed to allow a comprehensive assessment of the state of the economy.

Equity Markets: Domestic shares surged on Friday, tracking strong global cues. Shares across the globe rallied following a report that a drug developed by Gilead Sciences was showing effectiveness in treating the coronavirus. Sentiment was also boosted by US President Donald Trump's plans to gradually re-open the US economy.

Corporate News: Infosys will unveil its March-ended quarterly earnings today, 20 April 2020. HDFC Bank reported 17.72% rise in net profit to Rs 6,927.69 crore on 15.1% rise in total income to Rs 35,917.63 crore in Q4 March 2020 over Q4 March 2019. Kotak Mahindra Bank said that the meeting of the board of directors of the bank is scheduled on 22 April 2020 to consider and approve raising of equity capital by the bank through private placement, follow-on public offering (FPO), Qualified Institutions Placement (QIP) or through a combination thereof, as may be considered appropriate. S&P has affirmed the rating on ICICI Bank at BBB-. The rating outlook has been revised from stable to negative.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(337.6)	0.1	0.1
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)	2,811	29,660	29,660
F&O(INR cr)	742,469	1,093,108	1,093,108

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	38.2	44.1	44.1
NSE VIX	42.6	51.0	51.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,681	6.6 %	13.6 %	Energy	12,281	2.5 %	14.0 %
IT	12,649	1.5 %	5.0 %	Pharma	9,158	(0.5) %	30.3 %
Metals	1,817	2.1 %	16.9 %	Finance	9,906	5.5 %	10.8 %
Auto	5,669	5.1 %	21.7 %	PSU	1,315	2.0 %	2.5 %
FMCG	29,202	(1.1) %	10.8 %	Real Estate	188	3.6 %	9.1 %

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>
Indiabulls	125	17.9 %	26.2 %	Havells In	529	(3.6) %	9.1 %
Shriram Tr	802	17.7 %	29.0 %	Vodafone I	4	(3.5) %	34.4 %
Axis Bank	479	13.3 %	33.5 %	Nestle Ind	17,324	(3.2) %	10.7 %
ICICI Pru	370	10.5 %	8.0 %	Petronet L	212	(3.2) %	5.8 %
Eicher Mot	14,770	10.5 %	13.6 %	Cadila Hea	334	(2.8) %	26.5 %

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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