



21 Apr.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,019	(2.6) %	9.3 %
BSE SENSEX	31,648	0.2 %	9.1 %
CNX BANK	20,523	0.0 %	12.7 %
CNX MIDCAP	13,114	0.0 %	14.3 %
CNX SMALLCAP	4,106	0.0 %	16.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,650	(2.4) %	(17.1) %
S&P 500	2,823	(1.8) %	(12.6) %
FTSE 100	5,813	0.5 %	(23.6) %
HANG SENG	24,330	(0.2) %	(14.8) %
NIKKEI	19,669	(1.2) %	(15.2) %
SHANGHAI COMPOSITE	2,853	0.5 %	(7.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.91	(0.4) %	6.6 %
EUR/USD	1.09	(0.0) %	(3.1) %
GBP/USD	1.25	(0.1) %	(5.5) %
USD/JPY	107.75	(0.0) %	(0.8) %
USD/AUD	1.57	(0.8) %	10.3 %
USD/SGD	1.42	(0.4) %	5.6 %

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)	1,706	0.6 %	10.6 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,452	(2.1) %	(18.1) %
Copper(USD/MT)	5,170	(0.1) %	(16.2) %

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: China's central bank has cut benchmark lending rates today. The one-year loan prime rate was reduced by 20 basis points to 3.85% and the five-year loan prime rate was cut by 10 basis points to 4.65%. The People's Bank of China last week reduced its one-year medium-term lending facility, or MLF, rate to 2.95% from 3.15% and injected CNY 100 billion through the MLF operation. The coronavirus outbreak and the subsequent containment measures have plunged the German economy into a severe recession and an immediate recovery is unlikely, the Bundesbank said in its monthly report released on Monday. The Euro area current account surplus increased in February, following a rise in visible trade surplus, the European Central Bank reported Monday. The current account surplus rose to EUR 40 billion from EUR 32 billion in January. In the same period last year, the surplus totaled EUR 28 billion. UK Household Finance Index, which measures households' overall perceptions of financial well-being, dropped to 34.9 in April, its lowest since November 2011, from 42.5 in March, results of a survey by IHS Markit showed on Monday. A reading below 50 suggests a decline or deterioration. This signaled the largest month-to-month drop in the index since the survey's inception in 2009, IHS Markit said.

Global Equities: DOW slumped as crude oil price saw a historic slide with the WTI Crude oil futures for May turning deeply negative and settling at -\$37 per barrel.

Indian Economy: Reserve Bank Of India (RBI) noted today that to tide over the situation arising from the outbreak of the COVID-19 pandemic, it has been decided, in consultation with the Government of India, that the limit for Ways and Means Advances (WMA) for the remaining part of first half of the financial year 2020-21 (April 2020 to September 2020) will be revised to Rs 2,00,000 crore. The National Highways Authority of India (NHAI) resumed toll collection on national highways from Monday. The Union Home Ministry stated last week that select public activities would be allowed across states from 20 April.

Equity Markets: Sensex ended with tepid gains while the Nifty ended almost flat today after a volatile trading session. The rapidly rising number of Covid-19 infections in India and the resultant deaths put pressure on bourses. However, hopes of fresh relief measures and economic stimulus supported buying. The barometer index, the S&P BSE Sensex, rose 59.28 points or 0.19% at 31,648. The index rose as much as 467.75 points at the day's high of 32,056.47. It fell as much as 98.46 points at the day's low of 31,490.26.

Corporate News: Infosys said its consolidated net profit (after minority interest) fell 3.1% to Rs 4,321 crore on 0.8% rise in revenues to Rs 23,267 crore in Q4 March 2020 over Q3 December 2019. The result was announced after trading hours on Monday, 20 April 2020. On a consolidated basis, operating profit fell 2.7% to 4,927 crore in Q4 March 2020 over Q3 December 2019. Operating margin stood at 21.2% in Q4 March 2020 lower than 21.9% in Q3 December 2019. Tata Consultancy Services (TCS) and Amway, a global leader in direct selling, have entered into a strategic partnership to transform the latter's global technology operations. Amway was looking to transform its IT infrastructure and operations and its global service desk in order to improve agility, accelerate speed to market, and enhance customer experience. ACC, CRISIL, Den Networks, ICICI Prudential Life Insurance Company and GTPL Hathway among others are the companies that will release their March quarter earnings today, 21 April 2020.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(126.3)	(15.7)	(15.7)
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)	50,561	31,751	31,751
F&O(INR cr)	746,762	1,058,474	1,058,474

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	38.2	44.1	44.1
NSE VIX	43.5	50.2	50.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,523	(0.8) %	12.7 %	Energy	12,402	1.0 %	15.1 %
IT	12,848	1.6 %	6.7 %	Pharma	9,149	(0.1) %	30.2 %
Metals	1,756	(3.3) %	13.1 %	Finance	9,931	0.3 %	11.0 %
Auto	5,591	(1.4) %	20.0 %	PSU	1,370	4.2 %	6.8 %
FMCG	28,598	(2.1) %	8.5 %	Real Estate	189	0.6 %	9.8 %

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>
Tata Motor	80	4.7 %	18.4 %	Shriram Tr	685	(14.6) %	10.2 %
H P C L	227	4.5 %	23.6 %	Hindalco I	116	(6.2) %	27.1 %
HDFC AMC	2,793	4.3 %	27.8 %	Oracle Fin	2,035	(6.1) %	6.0 %
Infosys	653	3.9 %	8.4 %	Interglobe	1,004	(6.0) %	0.5 %
HDFC Bank	945	3.8 %	13.9 %	JSW Steel	168	(5.5) %	17.1 %

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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