



22 Feb.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,982	(0.9) %	81.5 %
BSE SENSEX	50,890	(0.8) %	80.0 %
CNX BANK	35,842	(2.0) %	96.8 %
CNX MIDCAP	23,119	(1.6) %	101.5 %
CNX SMALLCAP	7,980	(0.9) %	125.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,494	0.0 %	2.9 %
S&P 500	3,907	(0.2) %	4.0 %
FTSE 100	6,624	0.1 %	0.8 %
HANG SENG	30,645	0.2 %	11.5 %
NIKKEI	30,018	(0.7) %	10.1 %
SHANGHAI COMPOSITE	3,696	0.6 %	5.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.60	(0.2) %	(0.5) %
EUR/USD	1.21	0.0 %	(1.6) %
GBP/USD	1.39	0.4 %	2.0 %
USD/JPY	105.76	(0.2) %	2.5 %
USD/AUD	1.29	(0.2) %	(0.7) %
USD/SGD	1.33	(0.1) %	0.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	(2.1) %	24.4 %
Gold(INR/10g)	45,954	(0.7) %	(9.9) %
Gold Comex(USD/oz)	1,791	0.8 %	(8.1) %
SILVER(INR/1Kg)	68,173	(0.6) %	(1.0) %
Aluminium(USD/MT)	2,135	(0.6) %	6.0 %
Copper(USD/MT)	8,807	1.8 %	11.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	0.0 %	0.4 %

Global Economy: A report released by the National Association of Realtors or NAR on Friday showed another increase in US existing home sales in the month of January. NAR said existing home sales rose by 0.6% to an annual rate of 6.69 million in January after climbing by 0.9% to a revised rate of 6.65 million in December. The euro area private sector continued to contract in February, driven lower by a further slump in the service sector as virus-related restrictions continued to affect many businesses, survey results from IHS Markit showed on Friday. The composite output index rose to 48.1 in February from 47.8 in previous months. UK retail sales volume decreased 8.2% month-on-month, in contrast to a 0.4% rise seen in December, the Office for National Statistics said Friday. Excluding auto fuel, retail sales were down 8.8%, following a 0.4% gain in the previous month. All sectors saw a monthly decline in volume sales in January except for non-store retailers and food stores. Year-on-year, retail sales fell 5.9%, in contrast to a 3.1% rise in December. Japan cut its overall economic assessment for the first time in ten months. The government said that overall conditions are improving from a severely low base but consumer spending was weakening again. Adding to that is a downgrade to its view of private consumption for the first time since October last year. The government upgraded its assessment on capital spending, imports and corporate earnings though as improving overseas trade supported the economy.

Global Equities: The DOW saw little change on Friday but overall mood was supported on continued optimism about more fiscal stimulus.

Indian Economy: Finance Minister Nirmala Sitharaman on Sunday said the Union Budget 2021-22 is about the role of government as a facilitator and the private sector as a key driver of economic growth, without which the country would be losing a big opportunity. Sitharaman underlined that the nation's growing and aspiring needs and demands across the various sectors cannot be served just by the state government and central governments put together. The Centre has released the 17th instalment of Rs 5,000 crore to states as a back-to-back loan to meet the compensation shortfall in the collection of goods and services tax, taking the total amount released so far through the special borrowing window to Rs 1 lakh crore, the finance ministry said.

Equity Markets: Domestic indices declined for fourth consecutive session on Friday. Rising COVID-19 case and negative global cues triggered profit selling in domestic shares. The Nifty ended below the 15,000 mark. Banks, metals and pharma shares tumbled.

Corporate News: Local metal stocks could see continued buying support as COMEX Copper has hit a decade high, breaking above the key \$4 per pound level. Jubilant FoodWorks said its wholly-owned subsidiary Jubilant Foodworks Netherlands B.V. has entered into a purchase agreement to fully acquire Fides Food Systems Coöperatief U.A. Aarti Drugs will be in focus as company wound up UAE-based subsidiary Pinnacle Life Science LLC.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	163.5	301.3	164.5
MF(INR cr)	(1,220.4)	(1,205.2)	(558.4)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	87,496	87,345	61,903
F&O(INR cr)	2,755,177	4,258,079	2,368,826

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	22.1	22.3	28.2
NSE VIX	22.3	22.9	25.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,842	(2.0) %	96.8 %	Energy	18,682	(0.5) %	73.4 %
IT	25,503	(0.5) %	111.7 %	Pharma	12,347	(1.4) %	75.7 %
Metals	3,552	(2.0) %	128.6 %	Finance	16,747	(1.5) %	87.3 %
Auto	10,540	(2.6) %	126.3 %	PSU	2,465	(4.8) %	92.1 %
FMCG	33,337	(0.1) %	26.5 %	Real Estate	348	(1.3) %	102.2 %

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>
General In	205	20.0 %	94.7 %	Power Fin.	124	(5.1) %	39.8 %
Petronet L	252	2.5 %	26.1 %	O N G C	105	(5.1) %	59.8 %
Container	569	2.3 %	79.2 %	Bank of Ba	91	(4.7) %	78.0 %
UPL	553	2.2 %	80.8 %	Indraprast	543	(4.4) %	39.0 %
IndusInd B	1,066	1.9 %	211.4 %	Punjab Nat	42	(4.0) %	38.1 %

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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