



22 Mar.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,744	1.3 %	78.6 %
BSE SENSEX	49,858	1.3 %	76.4 %
CNX BANK	34,162	0.9 %	87.6 %
CNX MIDCAP	23,413	1.2 %	104.1 %
CNX SMALLCAP	8,207	0.7 %	131.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	32,628	(0.7) %	6.6 %
S&P 500	3,913	(0.1) %	4.2 %
FTSE 100	6,709	(1.1) %	2.1 %
HANG SENG	28,991	(1.4) %	5.5 %
NIKKEI	29,792	(1.4) %	9.3 %
SHANGHAI COMPOSITE	3,405	(1.7) %	(2.8) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.61	0.1 %	(0.5) %
EUR/USD	1.19	0.2 %	(2.6) %
GBP/USD	1.39	0.3 %	2.2 %
USD/JPY	109.01	(0.1) %	5.7 %
USD/AUD	1.28	(0.7) %	(1.1) %
USD/SGD	1.34	(0.2) %	1.6 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	2.4 %	29.0 %
Gold(INR/10g)	44,788	0.2 %	(12.2) %
Gold Comex(USD/oz)	1,748	0.6 %	(10.3) %
SILVER(INR/1Kg)	66,744	(0.3) %	(3.1) %
Aluminium(USD/MT)	2,188	(0.2) %	8.7 %
Copper(USD/MT)	9,036	(0.6) %	14.1 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	0.0 %	0.8 %

**Global Economy:** The US Federal Reserve said a temporary change to the supplementary leverage ratio, or SLR, for depository institutions will expire as scheduled on March 31, 2021. Germany's producer price index increased 1.9% year-on-year in February, following a 0.9% rise in January, data from Destatis showed on Friday. Excluding energy, producer prices rose 1.4% annually in February. Energy prices grew 3.7%. On a monthly basis, producer prices rose 0.7% in February, after a 1.4% increase in the previous month. The Bank of Japan decided to maintain the interest rate at -0.1% on current accounts that financial institutions maintain at the central bank. Also, the central bank decided to continue to purchase necessary amount of Japanese government bonds without setting an upper limit so that 10-year JGB yields will remain at around zero percent. However, the bank said it will allow the range of 10-year JGB yields to fluctuate between plus and minus 0.25% from the target level. Japan overall consumer prices were down 0.4% on year in February, the Ministry of Internal Affairs and Communications said on Friday, up from -0.6% in January. Core CPI, which exclude volatile food costs, also was down an annual 0.4%. Individually, prices were higher for housing, furniture and clothing. They were down for fuel, medical care, communication, education and recreation. Food prices were roughly flat. On a seasonally adjusted monthly basis, both overall and core inflation were up 0.1%. Australia retail sales were down a seasonally adjusted 1.1% on month in February, coming in at A\$30.192 billion, the Australian Bureau of Statistics said on Friday, following the 0.3% gain in January. All states and territories saw a fall in Food retailing, although the industry remains 6.5% above the levels of February 2020. On a yearly basis, retail sales were up 8.7%.

**Global Equities:** The US stocks ended a volatile week on mostly negative note. The DOW lost 0.7% as a slide under 33000 mark extended.

**Indian Economy:** The All-India Consumer Price Index Numbers for Agricultural Labourers and Rural Labourers (Base: 1986-87=100) for the month of February, 2021 decreased by 1 point each to stand at 1037 (One thousand and thirty seven) and 1044 (One thousand and forty four) points respectively. The fall in general index of Agricultural Labourers and Rural Labourers was due to decrease in the food group index (-) 2.94 and (-) 2.54 points respectively mainly on account of fall in the prices of wheat atta, gur, potato, cauliflower etc. Point to point rate of inflation based on the CPI-AL and CPI-RL increased to 2.67% and 2.76% respectively in February, 2021 from 2.17% and 2.35% respectively in January, 2021.

**Equity Markets:** Key benchmark indices ended near day's high with strong gains on Friday. Value buying emerged after the Sensex and the Nifty corrected a little over 4% in the past five sessions. Barring the Nifty Realty index, all sectoral indices ended in the green. The Nifty managed to close near 14,750 level after hitting the day's low of 14,350.10 in early trade.

**Corporate News:** Reliance Industries Limited refining complex in Jamnagar, the largest in the world, processed 14% less crude oil in February than it did a year ago, as per the petroleum and natural gas ministry's monthly report. Crude oil processed had declined 3% year-on-year in January while increasing 1% in the month before. Bharti Airtel entered into an agreement for the acquisition of 17,43,560 (representing 7.48% of paid up equity) equity shares in Sandhya Hydro Power Project Balargha Private Limited, a special purpose vehicle (SPV).



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	181.2	236.5	160.5
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)	98,788	74,667	63,103
F&O(INR cr)	3,101,644	4,583,081	2,539,513

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.0	23.1	27.8
NSE VIX	20.0	22.3	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	34,162	0.9 %	87.6 %	Energy	18,985	3.2 %	76.2 %
IT	25,563	0.7 %	112.2 %	Pharma	11,667	1.3 %	66.0 %
Metals	3,833	2.1 %	146.7 %	Finance	15,985	0.9 %	78.8 %
Auto	10,187	0.4 %	118.7 %	PSU	2,188	1.5 %	70.5 %
FMCG	34,028	2.4 %	29.1 %	Real Estate	329	(0.5) %	91.2 %

### 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 Gree	1,193	5.0 %	680.0 %	Power Fin.	124	(6.4) %	38.9 %
Indraprast	511	5.0 %	30.9 %	Interglobe	1,664	(3.3) %	66.5 %
NTPC	109	4.5 %	34.0 %	Bajaj Hold	3,429	(3.1) %	95.4 %
Hind. Unil	2,312	4.4 %	6.1 %	General In	219	(3.0) %	108.1 %
Power Grid	230	4.1 %	48.9 %	Avenue Sup	2,960	(2.4) %	42.1 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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