



22 Apr.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,027	0.5 %	9.4 %
BSE SENSEX	30,637	(3.2) %	8.3 %
CNX BANK	19,307	(0.5) %	6.0 %
CNX MIDCAP	12,695	(0.1) %	10.7 %
CNX SMALLCAP	3,949	0.0 %	11.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,019	(2.7) %	(19.3) %
S&P 500	2,737	(3.1) %	(15.3) %
FTSE 100	5,641	(3.0) %	(25.8) %
HANG SENG	23,794	(2.2) %	(16.6) %
NIKKEI	19,281	(2.0) %	(16.9) %
SHANGHAI COMPOSITE	2,827	(0.9) %	(8.4) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	76.30	0.6 %	7.2 %
EUR/USD	1.08	(0.2) %	(3.3) %
GBP/USD	1.23	(1.2) %	(6.4) %
USD/JPY	107.61	(0.0) %	(1.0) %
USD/AUD	1.59	1.0 %	11.4 %
USD/SGD	1.43	0.4 %	6.2 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	10 (45.2) %	(83.6) %	
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,713	0.4 %	11.0 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,444	(0.6) %	(18.5) %
Copper(USD/MT)	4,995	(3.4) %	(19.0) %

**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:** US existing home sales in the previous month, the National Association of Realtors released a report on Tuesday showing existing home sales pulled back sharply in the month of March. NAR said existing home sales plunged by 8.5% to an annual rate of 5.27 million in March after spiking by 6.3% to a revised of 5.76 million in February. German economic confidence improved strongly in April, survey data from the ZEW - Leibniz Centre for European Economic Research showed Tuesday. The ZEW Indicator of Economic Sentiment advanced 77.7 points to 28.2 points in April. Meanwhile, the current conditions index plunged 48.4 points to -91.5 points. UK unemployment rate rose 0.1 percentage point from the previous quarter to 4% in three months to February, data from the Office for National Statistics showed Tuesday. During three months to February, an estimated 1.36 million people were unemployed. This was 22,000 more than a year earlier. At the same time, the employment rate rose 0.2 percentage points from previous three months to a record high of 76.6%. Data showed that annual growth in average gross earnings excluding bonus was 2.9% and that including bonus came in at 2.8%. Reserve Bank of Australia's Governor Philip Lowe has noted that the Australian economy is set to experience the biggest contraction in national output and income since the 1930s due to the COVID-19 pandemic. Lowe expects the national output to fall by around 10% over the first half of 2020, with most of this decline taking place in the June quarter.

**Global Equities:** Global stocks slipped as coronavirus concerns and the oil market volatility weighed on the investor sentiment. DOW dropped 2.70%.

**Indian Economy:** RBI noted that in the wake of the nationwide lockdown due to outbreak of Covid -19 pandemic and the resultant restrictions imposed on movement of people, many farmers are not able to travel to bank branches for payment of their short term crop loan dues. Accordingly, to ensure that farmers do not have to pay penal interest and at the same time continue getting the benefits of interest subvention scheme, Government has decided to continue the availability of 2% interest subvention and 3% prompt repayment incentive to farmers for the extended period of repayment upto 31 May 2020 or date of repayment, whichever is earlier, for short term crop loans upto Rs 3 lakh per farmer which have become due between 1 March 2020 and 31 May 2020. Economic Advisory Council of the Fifteenth Finance Commission will meet on 23-24 April, 2020.

**Equity Markets:** Domestic shares slumped on Tuesday, mirroring weak global shares after the historic overnight plunge in US crude oil to below zero highlighted the economic damage caused by the coronavirus-led lockdowns. The barometer S&P BSE Sensex slumped 1,011.29 points or 3.20% to 30,636.71. The Nifty 50 index lost 280.40 points or 3.03% at 8,981.45

**Corporate News:** Reliance Industries (RIL), Jio Platforms (Jio Platforms) and Facebook, Inc. (Facebook) yesterday announced the signing of binding agreements for an investment of Rs 43,574 crore by Facebook into Jio Platforms. This investment by Facebook values Jio Platforms at Rs 4.62 lakh crore pre-money enterprise value (\$65.95 billion, assuming a conversion rate of Rs 70 to a US Dollar). Facebook's investment will translate into a 9.99% equity stake in Jio Platforms on a fully diluted basis. Jio Platforms is a wholly-owned subsidiary of RIL. ACC reported 6.64% fall in consolidated net profit to Rs 323 crore on 12.73% fall in total income to Rs 3,559.86 crore in Q1 March 2020 over Q1 March 2019. The company said that operations were severely impacted since the commencement of the nationwide lockdown from 24 March 2020 impacting volumes for the month of March 2020. HDFC reduced its Retail Prime Lending Rate (RPLR) on housing loans, on which its Adjustable Rate Home Loans (ARHL) are benchmarked, by 15 basis points, with effect from 22 April 2020. The change will benefit all existing HDFC retail home loan customers.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	12.1	(12.6)	(12.6)
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)	49,170	46,140	46,140
F&O(INR cr)	777,154	1,032,899	1,032,899

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	45.4	44.2	44.2
NSE VIX	45.2	49.8	49.8

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,409	(5.4) %	6.6 %	Energy	12,091	(2.5) %	12.2 %
IT	12,409	(3.4) %	3.0 %	Pharma	9,382	2.5 %	33.5 %
Metals	1,667	(5.1) %	7.3 %	Finance	9,469	(4.7) %	5.9 %
Auto	5,294	(5.3) %	13.7 %	PSU	1,317	(3.9) %	2.7 %
FMCG	28,481	(0.4) %	8.0 %	Real Estate	185	(1.8) %	7.8 %

### 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>
Aurobindo	644	19.1 %	64.3 %	Motherson	72	(15.1) %	24.2 %
Dr Reddy's	4,016	4.5 %	29.8 %	Shriram Tr	589	(14.1) %	(5.3) %
Page Indus	17,584	3.3 %	5.8 %	IndusInd B	401	(12.2) %	17.1 %
Cadila Hea	344	3.3 %	30.5 %	Indiabulls	116	(10.2) %	16.7 %
General In	146	3.1 %	38.6 %	Bandhan Ba	195	(9.6) %	0.2 %

### 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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