



23 Mar.2021

**INDEX PERFORMANCE**

| INDIAN INDICES | LATEST | % 1D    | % YTD   |
|----------------|--------|---------|---------|
| CNX NIFTY      | 14,799 | 0.4 %   | 79.3 %  |
| BSE SENSEX     | 49,771 | (0.2) % | 76.6 %  |
| CNX BANK       | 33,854 | 0.7 %   | 85.9 %  |
| CNX MIDCAP     | 23,821 | 0.9 %   | 107.7 % |
| CNX SMALLCAP   | 8,258  | 0.6 %   | 133.2 % |

| GLOBAL INDICES     | LATEST | % 1D    | % YTD   |
|--------------------|--------|---------|---------|
| DOW JONES          | 32,731 | 0.3 %   | 6.9 %   |
| S&P 500            | 3,941  | 0.7 %   | 4.9 %   |
| FTSE 100           | 6,726  | 0.3 %   | 2.3 %   |
| HANG SENG          | 28,885 | (0.4) % | 5.1 %   |
| NIKKEI             | 29,174 | (2.1) % | 7.0 %   |
| SHANGHAI COMPOSITE | 3,443  | 1.1 %   | (1.7) % |

**FOREX RATES**

|         | LATEST | % 1D    | % YTD   |
|---------|--------|---------|---------|
| USD/INR | 72.47  | (0.2) % | (0.7) % |
| EUR/USD | 1.19   | (0.3) % | (3.0) % |
| GBP/USD | 1.39   | (0.6) % | 1.5 %   |
| USD/JPY | 108.88 | (0.1) % | 5.5 %   |
| USD/AUD | 1.29   | 0.8 %   | (0.3) % |
| USD/SGD | 1.34   | 0.0 %   | 1.6 %   |

**COMMODITIES**

|                    | LATEST | % 1D    | % YTD    |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 61     | 2.4 %   | 29.0 %   |
| Gold(INR/10g)      | 44,641 | (0.3) % | (12.5) % |
| Gold Comex(USD/oz) | 1,748  | 0.6 %   | (10.3) % |
| SILVER(INR/1Kg)    | 65,657 | (1.6) % | (4.7) %  |
| 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 National Association of Realtors said existing home sales plunged by 6.6% to an annual rate of 6.22 million in February after inching up by 0.2% to a downwardly revised rate of 6.66 million in January. China left its benchmark lending rates unchanged, as widely expected, on Monday. The one-year loan prime rate was retained at 3.85% and the five-year loan prime rate was kept at 4.65%. The one-year and five-year loan prime rates were last lowered in April 2020. The euro area current account surplus dropped in January, the European Central Bank said Monday. The current account recorded a surplus of EUR 30 billion in January, down from EUR 37 billion in the previous month. The surplus on trade in goods rose to EUR 39 billion from EUR 38 billion in December. The surplus on services increased to EUR 12 billion from EUR 11 billion. Japan January final leading indicator index came in at 98.5 against 99.1 in preliminary reading, hitting the highest since October 2018. The Assessment of Coincident Index is signaling a possible turning point, noted the Japan Cabinet office. The coincident index came in at revised 90.3 versus 87.4 a month ago while the lagging index improved to 91.4 from 90.5 last month but below the flash estimate of 91.9.

**Global Equities:** The US stocks saw broadly supportive activity as the treasury yields pulled lower.

**Indian Economy:** Ministry of Petroleum & Natural Gas noted today that Government is making all efforts to reduce import dependence. India's oil and oil equivalent gas import dependence in 2014-15 and 2015-16 were 68.9% and 72.2% respectively and during current April-January, 2020-21 is 77.1%. Exploration and Production activities are taking place over around 275000 sq.km area across different sedimentary basins across India in onshore and offshore areas under Nomination, PSC and RSC Regimes. The rate of interest on Government of India Floating Rate Bond, 2033 (GOI FRB 2033) applicable for the half year March 22, 2021 to September 21, 2021 shall be 4.70% per annum. It may be recalled that FRB, 2033 will carry a coupon, which will have a Base rate equivalent to the average of the Weighted Average Yield (WAY) of last 3 auctions (from the rate fixing day i.e. March 22, 2021) of 182 Day T-Bills, plus a fixed spread (1.22%).

**Equity Markets:** Domestic equity benchmarks ended with minor cuts after a volatile session on Monday. Losses in private bank stocks offset the gains in IT shares. After briefly slipping below the 14,600 mark in afternoon trade, the Nifty 50 index recovered over 137 points from the day's low and ended near the flat line. Mixed global cues and rising Covid cases in India spoiled sentiment.

**Corporate News:** FICCI's latest quarterly survey on Manufacturing assessed recovery of manufacturing sector for Q-3 (October-December 2020-21) and pointed that the manufacturing sector is expected to regain the lost momentum in the Q-4. The percentage of respondents reporting higher production in third quarter of 2020-21 had increased vis-a-vis the Q-2 of 2020-21. Leading carmaker Maruti Suzuki announced a price increase across its range of vehicles from April to offset the impact of rising input costs.



### FUND FLOWS

|             | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 83.6          | 225.6      | 160.2      |
| 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) | 61,881        | 73,814         | 63,098         |
| F&O(INR cr)  | 2,907,224     | 4,471,358      | 2,541,026      |

### MARKET VOLATILITY

|          | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 21.0          | 23.1           | 27.8           |
| NSE VIX  | 20.5          | 22.2           | 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  | 33,603        | (1.6) %     | 84.5 %       | Energy      | 18,992        | 0.0 %       | 76.3 %       |
| IT     | 26,035        | 1.8 %       | 116.1 %      | Pharma      | 11,851        | 1.6 %       | 68.7 %       |
| Metals | 3,867         | 0.9 %       | 148.9 %      | Finance     | 15,802        | (1.1) %     | 76.7 %       |
| Auto   | 10,140        | (0.5) %     | 117.7 %      | PSU         | 2,164         | (1.1) %     | 68.6 %       |
| FMCG   | 34,608        | 1.7 %       | 31.3 %       | Real Estate | 338           | 2.7 %       | 96.4 %       |

### 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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| ACC                | 1,860         | 6.0 %       | 93.1 %       | IndusInd B        | 968           | (4.3) %     | 182.9 %      |
| Adani Port         | 722           | 5.2 %       | 194.9 %      | NMDC              | 128           | (3.9) %     | 63.2 %       |
| Adani Gree         | 1,252         | 5.0 %       | 719.0 %      | Power Grid        | 224           | (2.9) %     | 44.6 %       |
| Ambuja Cem         | 296           | 4.3 %       | 88.7 %       | Avenue Sup        | 2,880         | (2.7) %     | 38.3 %       |
| Tata Consu         | 621           | 3.4 %       | 121.6 %      | Motherson         | 206           | (2.7) %     | 255.5 %      |

### 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> |             |                  |               |               |                       |

..... End of Report .....