



23 Apr.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,232	0.5 %	11.9 %
BSE SENSEX	31,380	2.4 %	11.2 %
CNX BANK	19,871	0.9 %	9.1 %
CNX MIDCAP	12,901	0.8 %	12.5 %
CNX SMALLCAP	4,007	0.9 %	13.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,476	2.0 %	(17.7) %
S&P 500	2,799	2.3 %	(13.4) %
FTSE 100	5,771	2.3 %	(24.1) %
HANG SENG	23,893	0.4 %	(16.3) %
NIKKEI	19,138	(0.7) %	(17.5) %
SHANGHAI COMPOSITE	2,844	0.6 %	(7.8) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.99	0.1 %	6.7 %
EUR/USD	1.08	(0.2) %	(3.3) %
GBP/USD	1.23	(1.1) %	(6.6) %
USD/JPY	107.74	(0.0) %	(0.8) %
USD/AUD	1.58	0.6 %	11.0 %
USD/SGD	1.43	0.5 %	6.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	14	37.7 %	(77.5) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,740	1.6 %	12.8 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,462	1.2 %	(17.5) %
Copper(USD/MT)	5,034	0.8 %	(18.4) %

**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:** UK inflation slowed to a three-month low in March, data from the Office for National Statistics showed Wednesday. Consumer price inflation eased to 1.5% in March from 1.7% in February. This was the lowest rate since last December, when prices were up 1.3%. On a monthly basis, consumer prices remained flat after rising 0.4% in February. Excluding food and energy, core inflation eased marginally to 1.6% from 1.7% a month ago. Australia's leading index signaled deepening contraction in March due to the coronavirus pandemic, data from the Westpac showed Wednesday. The six month annualized growth rate in the Westpac- Melbourne Institute Leading Index fell to -2.47% in March from -0.97% in February. The score indicates the likely pace of economic activity relative to trend three to nine months into the future. The growth rate in the indicator was the most negative since the global financial crisis. The leading index growth rate has deteriorated 1.7 percentage points over the last six months.

**Global Equities:** US stocks jumped on a return in risk appetite. DOW added 2% on the day after witnessing losses earlier this week.

**Indian Economy:** The Covid-19 pandemic is having a deep impact on the Indian economy and members of Indian industry. The magnitude and speed of collapse in economic activity that India has seen over the last few weeks is unprecedented and there is tremendous uncertainty about what the future holds for businesses and enterprises. Almost 72% of the respondents to the 'FICCI-Dhruva survey' have reported that covid-19 is having a 'high to very high' level of impact on their business. FICCI-Dhruva survey noted that a substantial majority of the respondents do not foresee a positive demand outlook for their business in this fiscal, with 70% of the surveyed firms expecting de-growth in sales in the fiscal year 2020-21.

**Equity Markets:** Key equity barometers ended with robust gains on Wednesday. The Nifty managed to close above the 9100 mark. The barometer S&P BSE Sensex, jumped 742.84 points or 2.42% at 31,379.55. The Nifty 50 index gained 205.85 points or 2.29% at 9,187.30. In the broader market, the S&P BSE Mid-Cap index rose 0.78% while the S&P BSE Small-Cap index added 0.73%. Both these indices underperformed the Sensex.

**Corporate News:** Piramal Enterprises said that CARE Ratings has re-affirmed credit rating for Long Term Non-Convertible Debentures to CARE AA; Stable and Commercial Paper to CARE A1+. The board of directors of TVS Motor Company will meet on 28 April 2020 for considering the issuance of listed, rated, unsecured, redeemable, non-convertible debentures on a private placement basis. Torrent Pharmaceuticals informed that India Ratings and Research (Ind-Ra) has affirmed the company's Long-Term Issuer Rating at 'INDAA'. The outlook is stable. KNR Constructions said that the company's SPVs has re-commenced the collection of user fee (toll) on all the NHAI projects.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(238.9)	(35.3)	(35.3)
MF(INR cr)	420.1	(526.6)	(526.6)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	55,162	46,891	46,891
F&O(INR cr)	1,105,882	1,038,981	1,038,981

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	42.0	44.1	44.1
NSE VIX	42.8	49.2	49.2

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,702	1.5 %	8.2 %	Energy	12,486	3.3 %	15.9 %
IT	12,571	1.3 %	4.4 %	Pharma	9,377	(0.0) %	33.4 %
Metals	1,673	0.4 %	7.7 %	Finance	9,569	1.1 %	7.0 %
Auto	5,427	2.5 %	16.5 %	PSU	1,316	(0.1) %	2.6 %
FMCG	29,185	2.5 %	10.7 %	Real Estate	184	(0.8) %	6.9 %

### 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>
Zee Entert	152	17.5 %	25.6 %	ONGC	65	(5.8) %	(0.6) %
Reliance I	1,364	10.2 %	26.2 %	Interglobe	960	(5.0) %	(3.9) %
ACC	1,230	8.2 %	27.6 %	Cadila Hea	331	(3.7) %	25.6 %
Colgate-Pa	1,508	7.4 %	21.4 %	Vedanta	76	(3.0) %	21.5 %
Vodafone I	4	6.8 %	29.5 %	Siemens	1,132	(2.4) %	4.3 %

### 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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