



23 Apr.2021

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|---------|
| CNX NIFTY | 14,384 | (0.2) % | (3.2) % |
| BSE SENSEX | 48,081 | 0.8 % | (4.2) % |
| CNX BANK | 31,682 | (0.3) % | (6.4) % |
| CNX MIDCAP | 23,595 | 0.7 % | (2.2) % |
| CNX SMALLCAP | 8,277 | 0.7 % | (0.1) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| DOW JONES | 33,816 | (1.9) % | 10.5 % |
| S&P 500 | 4,135 | (0.9) % | 10.1 % |
| FTSE 100 | 6,938 | 0.6 % | 5.6 % |
| HANG SENG | 28,755 | 0.5 % | 4.7 % |
| NIKKEI | 29,188 | 2.4 % | 7.1 % |
| SHANGHAI COMPOSITE | 3,465 | (0.2) % | (1.1) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 75.39 | 1.2 % | 3.3 % |
| EUR/USD | 1.20 | 0.4 % | (2.0) % |
| GBP/USD | 1.39 | 0.7 % | 2.1 % |
| USD/JPY | 108.08 | (0.7) % | 4.8 % |
| USD/AUD | 1.29 | 0.0 % | (0.3) % |
| USD/SGD | 1.33 | (0.4) % | 0.6 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 61 | (1.7) % | 28.8 % |
| Gold(INR/10g) | 47,569 | 0.5 % | (6.7) % |
| Gold Comex(USD/oz) | 1,783 | 0.6 % | (8.5) % |
| SILVER(INR/1Kg) | 69,875 | 1.4 % | 1.5 % |
| Aluminium(USD/MT) | 2,344 | 0.9 % | 16.4 % |
| Copper(USD/MT) | 9,383 | (0.1) % | 18.5 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec US 10 | 1.6 | (0.0) % | 0.6 % |

Global Economy: The US Conference Board on Thursday showed its index of leading US economic indicators increased in the month of March. The Conference Board said its leading economic index jumped by 1.3% in March after edging down by a revised 0.1% in February. The US National Association of Realtors said existing home sales tanked by 3.7% to an annual rate of 6.01 million in March after plunging by 6.3% to a revised rate of 6.24 million in February. China's economy has benefited from through going pandemic response measures that allowed the government to reopen the economy last spring, according to MERICS Economic Indicators Q1/2021. China first quarter GDP surged by 18.3% in 2021, the highest quarterly growth on record. On a quarter-by-quarter basis, China's GDP grew by 0.6 percent, a less dramatic number that nonetheless confirms that recovery is continuing. Growth rates will begin to normalize to pre-crisis levels over the next quarters. UK manufacturing orders grew at the fastest pace in two years and the optimism among manufacturers rose the most since 1973, survey results from the Confederation of British Industry showed on Thursday. The order book balance rose to +5% in three months to April from -12% in January. The Japanese economy shows weakness in some components" and remains in a "severe situation due to the novel coronavirus," although it continues to show signs of picking up, the Cabinet Office said in its overall assessment, using the same wording for the third straight month.

Global Equities: The US stocks slipped on Thursday amid worries that President Biden is considering a major capital gains tax hike on the rich.

Indian Economy: Fitch Ratings on Thursday said the resurgence of COVID-19 infections may delay India's economic recovery, but won't derail it, as it kept the sovereign rating unchanged at 'BBB-' with a negative outlook. It projected a 12.8% recovery in GDP in the fiscal year ending March 2022 (FY22), and estimated a growth of to 5.8% in FY23, from an estimated contraction of 7.5% in 2020-21. Fitch had in June last year revised outlook for India to 'negative' from 'stable' on grounds that the coronavirus pandemic had significantly weakened the country's growth outlook and exposed the challenges associated with a high public debt burden.

Equity Markets: The domestic equity benchmarks ended near the day's high on Thursday. Trading was volatile due to expiry of weekly index options on the NSE. Banks, financials, metals and realty stocks advanced while FMCG, IT and pharma shares corrected.

Corporate News: Tata Motors said that JLR is currently experiencing some COVID-19 supply chain disruption. As a result, JLR have adjusted production schedules for certain vehicles. Visaka Industries reported sharply higher consolidated profit at Rs 30.87 crore in Q4FY21 against Rs 6.85 crore in Q4FY20. The revenue rose to Rs 354.18 crore from Rs 227.7 crore reported in the year-ago period.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (97.4) | (81.3) | (81.3) |
| MF(INR cr) | 30.8 | 96.3 | 96.3 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 75,707 | 69,042 | 69,042 |
| F&O(INR cr) | 8,849,232 | 4,944,210 | 4,944,210 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 18.7 | 17.3 | 17.3 |
| NSE VIX | 23.0 | 21.2 | 21.2 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 31,783 | 2.2 % | (6.1) % | Energy | 17,371 | 0.2 % | (6.2) % |
| IT | 25,827 | (0.2) % | (0.6) % | Pharma | 13,379 | (0.4) % | 8.1 % |
| Metals | 4,461 | 1.7 % | 6.5 % | Finance | 15,240 | 2.1 % | (4.2) % |
| Auto | 9,645 | 0.1 % | (3.8) % | PSU | 1,961 | 0.7 % | (11.4) % |
| FMCG | 34,043 | (0.7) % | (2.4) % | Real Estate | 305 | 1.3 % | (9.1) % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| DLF | 247 | 5.4 % | (15.4) % | Godrej Con | 704 | (3.0) % | (3.1) % |
| Petronet L | 230 | 4.5 % | 0.9 % | Piramal En | 1,657 | (2.8) % | (6.9) % |
| Motherson | 213 | 4.0 % | 1.0 % | Titan Comp | 1,481 | (2.8) % | (5.0) % |
| ICICI Bank | 579 | 3.6 % | (2.6) % | Shree Ceme | 28,522 | (2.7) % | (4.8) % |
| Wipro | 487 | 3.5 % | 16.9 % | Lupin | 1,061 | (2.7) % | 3.3 % |

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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