



24 Apr.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,164	(1.6) %	11.0 %
BSE SENSEX	31,863	1.5 %	10.8 %
CNX BANK	19,698	(2.8) %	8.2 %
CNX MIDCAP	12,834	(1.0) %	11.9 %
CNX SMALLCAP	4,011	(0.7) %	13.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,515	0.2 %	(17.6) %
S&P 500	2,798	(0.1) %	(13.4) %
FTSE 100	5,827	1.0 %	(23.4) %
HANG SENG	23,977	0.4 %	(16.0) %
NIKKEI	19,429	1.5 %	(16.3) %
SHANGHAI COMPOSITE	2,839	(0.2) %	(8.0) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.29	(1.3) %	5.7 %
EUR/USD	1.08	(0.5) %	(3.7) %
GBP/USD	1.23	0.1 %	(6.4) %
USD/JPY	107.66	0.0 %	(0.9) %
USD/AUD	1.57	(0.9) %	10.4 %
USD/SGD	1.42	(0.3) %	5.9 %

**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:** More than 4 million people filed first-time claims for U.S. unemployment benefits in the week ended April 18th, according to a report released by the Labor Department. The IHS Markit flash Eurozone services purchasing managers index in April skidded to a record low of 11.7 from 26.4 in March, while the manufacturing PMI fell to a 134-month low of 33.6 from 44.5. The French services PMI fell to 10.4 in April from 27.4 in March, a record low, and the German services PMI dropped to 15.9 from 31.7. Japan manufacturing sector continued to contract in April with a PMI score of 37.8, the latest survey from Jibun Bank revealed on Thursday. That's down from 41.1 in March and it moves further beneath the boom-or-bust line of 50 that separates expansion from contraction. The survey also showed that the services index came in with a score of 22.8 and the composite was at 27.8. Australia's exports soared in March, preliminary data published by the Australian Bureau of Statistics showed Thursday. Exports jumped 29 % in March. After falling in January and February, exports of iron ore to China, Australia's largest trading partner, increased significantly in March. At the same time, imports rose 10% on month in March.

**Global Equities:** US stocks finished the day near the unchanged line after failing to sustain an early rally.

**Indian Economy:** RBI has announced Special Open Market Operations (OMO) of Simultaneous Purchase and Sale of Government of India Securities. On a review of current and evolving liquidity and market conditions, the Reserve Bank has decided to conduct simultaneous purchase and sale of government securities under Open Market Operations (OMO) for Rs 10,000 crores each on April 27, 2020.

**Equity Markets:** The domestic equity barometers advanced on Thursday, in line with other Asian markets, as oil prices recovered from a collapse. Hopes of a fresh stimulus package to mitigate the economic damage caused by the coronavirus outbreak also lifted sentiment. The barometer index, the S&P BSE Sensex, added 483.53 points or 1.54% at 31,863.08. The Nifty 50 index advanced 126.60 points or 1.38% at 9,313.90.

**Corporate News:** Axis Bank said its board will consider borrowing / raising funds in Indian Currency / Foreign Currency by issue of debt instruments including but not limited to Bonds and Non-Convertible Debentures on 28 April 2020. Mahindra & Mahindra (M&M) said that the Loans & Investment Committee has approved issuance and offer of 6.78%, 10,000 nos. of Rated, Listed, Unsecured, Redeemable Non-convertible Debentures of Rs 10 lakh each aggregating Rs 1,000 crore for cash at par, (NCDs) on private placement basis. Bharti Infratel reported 6.9% rise in consolidated net profit to Rs 649.50 crore on 0.35% rise in total income to Rs 1,965.20 crore in Q4 March 2020 over Q4 March 2019.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(103.0)	(41.4)	(41.4)
MF(INR cr)	358.6	(532.2)	(532.2)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	2,680	43,491	43,491
F&O(INR cr)	2,107,936	1,121,208	1,121,208

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	42.0	44.1	44.1
NSE VIX	39.2	48.4	48.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,268	2.9 %	11.3 %	Energy	12,439	(0.4) %	15.5 %
IT	13,128	4.4 %	9.0 %	Pharma	9,389	0.1 %	33.6 %
Metals	1,695	1.3 %	9.1 %	Finance	9,809	2.5 %	9.7 %
Auto	5,465	0.7 %	17.3 %	PSU	1,311	(0.4) %	2.2 %
FMCG	28,786	(1.4) %	9.2 %	Real Estate	185	0.8 %	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>
Vodafone I	4	10.1 %	42.6 %	Titan Comp	913	(4.1) %	(2.5) %
Kotak Mah.	1,250	8.5 %	5.8 %	Biocon	348	(3.6) %	24.9 %
Shriram Tr	644	6.2 %	3.5 %	ACC	1,190	(3.2) %	23.6 %
TCS	1,878	6.1 %	9.9 %	HDFC Life	489	(3.0) %	13.6 %
Infosys	679	5.8 %	12.7 %	Hind. Unil	2,318	(2.9) %	6.3 %

### 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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