



25 Feb.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,982	1.9 %	81.5 %
BSE SENSEX	50,782	2.1 %	79.7 %
CNX BANK	36,452	3.8 %	100.2 %
CNX MIDCAP	23,291	1.0 %	103.0 %
CNX SMALLCAP	8,034	0.9 %	126.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,962	1.4 %	4.4 %
S&P 500	3,925	1.1 %	4.5 %
FTSE 100	6,659	0.5 %	1.3 %
HANG SENG	29,718	(3.0) %	8.2 %
NIKKEI	29,672	(1.6) %	8.9 %
SHANGHAI COMPOSITE	3,564	(2.0) %	1.7 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.43	(0.0) %	(0.7) %
EUR/USD	1.21	0.2 %	(1.0) %
GBP/USD	1.40	0.2 %	2.9 %
USD/JPY	105.40	(0.1) %	2.2 %
USD/AUD	1.27	(0.3) %	(2.4) %
USD/SGD	1.32	(0.2) %	0.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	3.8 %	29.1 %
Gold(INR/10g)	46,621	(0.2) %	(8.6) %
Gold Comex(USD/oz)	1,813	(0.1) %	(7.0) %
SILVER(INR/1Kg)	69,342	(0.8) %	0.7 %
Aluminium(USD/MT)	2,137	(0.8) %	6.1 %
Copper(USD/MT)	9,158	1.0 %	15.7 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	(0.0) %	0.4 %

**Global Economy:** It may take more than three years to reach the Federal Reserve's inflation goals, Fed Chair Jerome Powell told lawmakers on Wednesday, hinting that the US central bank will likely leave interest rates unchanged for a long time to come. Data released by the Commerce Department on Wednesday showed a sharp jump in new home sales in the US in the month of January. The Commerce Department said new home sales spiked by 4.3% to an annual rate of 923,000 in January after soaring by 5.5% to a revised rate of 885,000 in December. German gross domestic product grew 0.3% sequentially in the fourth quarter instead of 0.1% estimated previously, revised data from Destatis showed on Wednesday. However, this was much slower than the 8.5% rebound seen in the third quarter. On a yearly basis, the decline in GDP slowed to 3.7% from 4%. The fourth quarter rate was revised from -3.9%. The price-adjusted GDP dropped by revised 2.7% annually after easing 3.9% in the third quarter. The Hong Kong government plans to spend HK\$120 billion to alleviate the hardship and pressure caused by the coronavirus pandemic, Financial Secretary Paul Chan said in his 2021-22 budget speech on Wednesday. The economy contracted 6.1% in 2020, which was the largest annual fall on record.

**Global Equities:** The US stocks saw firm action as buyers were active amid supportive economic cues and lax US monetary policy outlook.

**Indian Economy:** The Finance Minister stated that the government has now lifted the embargo on private sector banks (only a few were permitted earlier) for the conduct of government related business. This step is expected to further enhance customer convenience. All banks can now participate. Private Banks can now be equal partners in development of the Indian economy, furthering Government's social sector initiatives, and enhancing customer convenience. The Union Cabinet chaired by the Prime Minister, Narendra Modi has approved the Production Linked Incentive (PLI) Scheme for IT Hardware. India has been containing the country's Active Caseload under 1.50 lakh. The active cases are 1,46,907 now.

**Equity Markets:** The domestic equity benchmarks ended with strong gains in the extended trading session on Wednesday. Bank shares led the charge. The Nifty ended near the 15,000 mark. The market breadth was strong. On the BSE, 1854 shares rose and 1081 shares fell. A total of 164 shares were unchanged. The NSE and the BSE extended trading hours till 5:00 PM. Trading was halted in the morning due to a technical glitch.

**Corporate News:** IT counters could stay in focus following sustained gains in the Indian Rupee. INR hit around 72.25 per US dollar in intraday moves and ended up 10 basis points at 72.35, lingering around one year high. Dredging Corporation of India signed MoU to construct first ever Trailing Suction Hopper Dredger in Indian Shipyard for the first time in Republic India with Cochin Shipyard Limited. Local metal counters could gain further as COMEX Copper spiked 3% to fresh decade high above \$4.30 per pound.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(47.7)	245.6	162.4
MF(INR cr)	(1,220.4)	(1,205.2)	(558.4)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	40,698	84,167	61,989
F&O(INR cr)	3,067,843	4,131,011	2,383,785

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.1	22.4	28.2
NSE VIX	24.2	23.3	25.8

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	36,452	3.8 %	100.2 %	Energy	18,782	0.3 %	74.4 %
IT	24,779	(0.1) %	105.7 %	Pharma	12,036	0.1 %	71.3 %
Metals	3,779	0.8 %	143.2 %	Finance	16,951	3.4 %	89.6 %
Auto	10,406	0.3 %	123.4 %	PSU	2,463	2.8 %	91.9 %
FMCG	33,092	0.2 %	25.5 %	Real Estate	350	0.9 %	103.6 %

### 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>
Interglobe	1,621	5.9 %	62.3 %	Info Edg.(	4,937	(2.7) %	145.1 %
Coal India	144	5.5 %	3.5 %	Adani Gree	1,169	(2.2) %	664.8 %
HDFC Bank	1,606	5.1 %	93.6 %	UPL	554	(2.2) %	81.2 %
Axis Bank	749	4.7 %	109.0 %	Power Grid	223	(1.5) %	44.1 %
Container	581	4.3 %	83.1 %	Dr Reddy's	4,436	(1.3) %	43.3 %

### 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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