



25 Mar.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,549	(1.8) %	76.3 %
BSE SENSEX	49,180	(1.7) %	74.0 %
CNX BANK	33,293	(2.6) %	82.8 %
CNX MIDCAP	23,335	(2.0) %	103.4 %
CNX SMALLCAP	8,066	(2.1) %	127.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	32,420	(0.0) %	5.9 %
S&P 500	3,889	(0.6) %	3.5 %
FTSE 100	6,713	0.2 %	2.1 %
HANG SENG	27,918	(2.0) %	1.6 %
NIKKEI	28,406	(2.0) %	4.2 %
SHANGHAI COMPOSITE	3,367	(1.3) %	(3.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.57	0.1 %	(0.5) %
EUR/USD	1.19	(0.1) %	(3.1) %
GBP/USD	1.38	(0.5) %	1.1 %
USD/JPY	108.68	(0.2) %	5.3 %
USD/AUD	1.30	0.8 %	0.4 %
USD/SGD	1.34	0.0 %	1.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	(6.0) %	21.3 %
Gold(INR/10g)	44,679	(0.3) %	(12.4) %
Gold Comex(USD/oz)	1,734	(0.5) %	(11.1) %
SILVER(INR/1Kg)	65,036	(1.0) %	(5.6) %
Aluminium(USD/MT)	2,205	0.8 %	9.5 %
Copper(USD/MT)	9,017	(0.2) %	13.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	(0.1) %	0.7 %

Global Economy: New orders for US manufactured durable goods unexpectedly decreased in the month of February, the Commerce Department revealed in a report released on Wednesday. The Commerce Department said durable goods orders slumped by 1.1% in February after spiking by an upwardly revised 3.5% in January. Euro area consumer confidence rose in March to its highest level in over a year, preliminary survey data from the European Commission showed Wednesday. The flash consumer confidence index climbed to -10.8 from -14.8 in February. German flash composite output index rose to a 37-month high of 56.8 in March from 51.1 in February, flash data from IHS Markit showed on Wednesday. The result was driven by improved performances across both manufacturing and services. The services Purchasing Managers' Index came in at 50.8 versus 45.7 in the prior month. The manufacturing PMI advanced to 66.6 from 60.7 in the previous month. The latest score was the highest since April 1996. UK consumer price inflation eased to 0.4% in February from 0.7% in January, figures from the Office for National Statistics revealed on Wednesday. Japan manufacturing sector continued to expand in March with a manufacturing PMI score of 52.0, the latest survey from Jibun Bank showed on Wednesday. That's up from 51.4 in February and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. Japan's services PMI came in at 46.5, up from 45.8 in February, while the composite index had a score of 48.3 - up from 48.2 in the previous month. Australia manufacturing sector continued to expand in March, with a manufacturing PMI score of 57.0, the latest survey from Markit Economics showed on Wednesday. That's up from 56.9 in February and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. The uptick was supported by quicker increases in factory orders and employment, while production growth eased marginally from February. Australia's services PMI came in at 56.2, up sharply from 53.4 in February, while the composite index had a score of 56.2 - up from 53.7 in the previous month.

Global Equities: The US stocks edged up after steep losses in the previous session. Markets focused on latest comments from the US Fed stating that long term inflationary trend in US remains in check.

Indian Economy: India has crossed a significant milestone in the fight against the global pandemic. The cumulative number of COVID19 vaccine doses administered in the country has crossed 5 crore. The Reserve Bank Of India (RBI) has reported that currency in circulation contracted by 0.4% on the week to stand at Rs 28.49 lakh crore as on March 19th 2021. The central bank stated further that the overall reserve money spiked 1.4% on the week at Rs 34.49 lakh crore. Currency in circulation rose around 18.3% on a year ago basis compared to 12.20% growth at the same time last year. In the current fiscal, the currency in circulation has expanded by 16.4% so far while the reserve money has increased by around 13%.

Equity Markets: Domestic equity benchmarks ended near the day's low amid significant selloff on Wednesday. Barring the Nifty Pharma index, all the sectoral indices on the NSE ended in the red. Banks, auto and metal shares witnessed steep selling. The Nifty ended tad above the 14,550 mark, after hitting the day's low at 14,535.

Corporate News: Jubilant Foodworks has entered into an exclusive master franchise and development agreement with PLK APAC Pte Ltd, a subsidiary of Restaurant Brands International Inc. Escorts Agri Machinery (EAM), a division of Escorts Ltd, said it will increase tractor prices with effect from next month. SAIL will be in focus as its Rourkela steel plant has crossed 92 MT of crude steel production.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(4.1)	199.5	159.0
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)	61,801	72,642	63,104
F&O(INR cr)	4,442,583	4,424,185	2,553,511

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.9	22.5	27.8
NSE VIX	22.5	22.1	25.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	33,293	(2.6) %	82.8 %	Energy	18,677	(1.7) %	73.4 %
IT	25,803	(1.2) %	114.2 %	Pharma	11,916	0.1 %	69.6 %
Metals	3,718	(3.2) %	139.3 %	Finance	15,604	(2.1) %	74.5 %
Auto	9,925	(2.6) %	113.1 %	PSU	2,153	(3.3) %	67.8 %
FMCG	33,987	(1.4) %	28.9 %	Real Estate	331	(2.9) %	92.6 %

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>
Cipla	793	2.2 %	91.6 %	Tata Steel	703	(5.2) %	163.9 %
Adani Tran	865	2.0 %	356.5 %	Motherson	202	(4.7) %	247.8 %
Asian Pain	2,444	1.4 %	52.4 %	DLF	284	(4.6) %	114.4 %
Aurobindo	856	1.1 %	118.2 %	Punjab Nat	37	(4.5) %	21.5 %
Power Grid	221	0.9 %	43.0 %	Adani Port	707	(4.3) %	188.7 %

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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