



26 Feb.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	15,097	0.0 %	82.9 %
BSE SENSEX	51,039	0.5 %	80.6 %
CNX BANK	36,549	0.0 %	100.7 %
CNX MIDCAP	23,647	0.0 %	106.1 %
CNX SMALLCAP	8,149	0.0 %	130.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,402	(1.8) %	2.6 %
S&P 500	3,829	(2.5) %	2.0 %
FTSE 100	6,652	(0.1) %	1.2 %
HANG SENG	30,074	1.2 %	9.5 %
NIKKEI	30,168	1.7 %	10.7 %
SHANGHAI COMPOSITE	3,585	0.6 %	2.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.30	(0.2) %	(0.9) %
EUR/USD	1.22	0.1 %	(0.9) %
GBP/USD	1.41	0.7 %	3.6 %
USD/JPY	105.74	0.3 %	2.5 %
USD/AUD	1.26	(0.5) %	(2.8) %
USD/SGD	1.32	(0.2) %	(0.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	2.8 %	32.8 %
Gold(INR/10g)	46,339	(0.6) %	(9.2) %
Gold Comex(USD/oz)	1,805	(0.4) %	(7.4) %
SILVER(INR/1Kg)	69,840	0.7 %	1.4 %
Aluminium(USD/MT)	2,146	0.4 %	6.6 %
Copper(USD/MT)	9,286	1.4 %	17.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.4	0.0 %	0.5 %

Global Economy: The US Commerce Department said GDP surged up by 4.1% in the fourth quarter compared to the previously reported 4% rise. The US durable goods orders soared by 3.4% in January after gaining by an upwardly revised 1.2% in December. The US Labor Department said initial jobless claims tumbled to 730,000, a decrease of 111,000 from the previous week's revised level of 841,000. Eurozone money supply growth improved in January, while growth in credit to the private sector eased, data from the European Central Bank showed on Thursday. The M3 monetary aggregate grew 12.5% annually after rising 12.4% in December. In three months to January, M3 expanded 12% on average. At the same time, the narrow measure M1 growth accelerated to 16.4% from 15.6% a month ago. German consumer confidence is set to improve in March, survey results from the market research group GfK showed on Thursday. The forward-looking consumer sentiment index rose to -12.9 in March from revised -15.5 in the previous month. The expected level was -14.3. The German economic expectations came in at 8.0, rising from 1.3 in January. After four consecutive declines, the income expectations index also rose to 6.5 in February from -2.9 in the previous month. Australia private capital expenditure was up 3% on quarter in the fourth quarter of 2020, the Australian Bureau of Statistics said on Thursday, following the 3% decline in the three months prior. Capex for buildings and structures rose 0.7% in the December quarter 2020, while capex for equipment, plant and machinery rose 5.7% in the December quarter 2020. Capex for mining fell 1.4% in the December quarter 2020, while capex for non-mining rose 4.9% in the December quarter 2020.

Global Equities: The Dow tanked in last session and tech stocks extended losses as a sudden spike in US government bond yields hurt the sentiments.

Indian Economy: Shaktikanta Das, Governor, Reserve Bank of India (RBI), noted in a latest speech today that the past year has witnessed unimaginable misery and agony across the world entailing large destruction of human life and wealth. Governments and central banks across the globe unleashed conventional and unconventional policy support to fight its devastating adverse impact. The manufacturing sector is spearheading the growth recovery as many contact intensive services sub-sectors are severely affected by the crisis. The initiatives by the Government under the AatmaNirbhar Bharat Abhiyaan and Union Budget 2021-22 towards developing a vibrant manufacturing sector and infrastructure acknowledges the strong linkages they have with the rest of the sectors. The Production Linked Incentive (PLI) Scheme aims to make India an integral part of the global value chain. This, along with reforms in labour market, can go a long way in propelling growth to an elevated trajectory for the manufacturing sector and reap its employment potential. The second advance estimates of production of major crops reveal a record production of 303.34 million tonnes of food grains.

Equity Markets: Key benchmark indices ended with strong gains on Thursday, rising for the third consecutive session. The Nifty closed near the crucial 15,100 mark. Positive global cues boosted investors' sentiment. Trading was volatile as the February 2021 F&O contracts expired today. FMCG stocks lagged the broader rally.

Corporate News: Zydus Cadila on Thursday said it has received final approval from the US health regulator to market antidepressant Nortriptyline Hydrochloride capsules. RailTel Corporation of India will list its equity shares today. The issue price has been fixed at Rs 94 per share. Local oil marketing companies will be in focus as WTI Crude spiked above \$63 per barrel.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(41.6)	228.7	161.4
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)	91,781	84,568	62,121
F&O(INR cr)	8,615,815	4,367,054	2,411,238

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.3	22.4	28.2
NSE VIX	22.9	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	36,549	0.3 %	100.7 %	Energy	19,356	3.1 %	79.7 %
IT	24,872	0.4 %	106.5 %	Pharma	12,142	0.9 %	72.8 %
Metals	3,929	4.0 %	152.9 %	Finance	16,919	(0.2) %	89.2 %
Auto	10,498	0.9 %	125.4 %	PSU	2,491	1.2 %	94.2 %
FMCG	33,002	(0.3) %	25.2 %	Real Estate	356	1.7 %	107.1 %

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>
Coal India	156	8.1 %	11.9 %	Adani Gree	1,129	(3.5) %	638.1 %
UPL	593	7.0 %	93.9 %	Marico	410	(3.4) %	54.4 %
SBI Cards	1,110	6.7 %	82.6 %	ICICI Bank	628	(2.0) %	101.8 %
Adani Port	704	5.9 %	187.7 %	L & T Info	3,657	(1.7) %	162.6 %
Hindalco I	351	5.4 %	282.7 %	Abbott Ind	14,353	(1.6) %	(8.1) %

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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