



26 Mar.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,325	(1.5) %	73.6 %
BSE SENSEX	48,440	(1.5) %	71.4 %
CNX BANK	33,006	(0.9) %	81.3 %
CNX MIDCAP	22,859	(2.0) %	99.3 %
CNX SMALLCAP	7,891	(2.2) %	122.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	32,619	0.6 %	6.6 %
S&P 500	3,910	0.5 %	4.1 %
FTSE 100	6,675	(0.6) %	1.6 %
HANG SENG	27,900	(0.1) %	1.6 %
NIKKEI	28,730	1.1 %	5.4 %
SHANGHAI COMPOSITE	3,364	(0.1) %	(4.0) %

**FOREX RATES**

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

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	(4.3) %	23.0 %
Gold(INR/10g)	44,653	(0.1) %	(12.5) %
Gold Comex(USD/oz)	1,730	(0.4) %	(11.2) %
SILVER(INR/1Kg)	63,777	(1.9) %	(7.4) %
Aluminium(USD/MT)	2,208	(0.6) %	9.7 %
Copper(USD/MT)	8,781	(2.6) %	10.9 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	0.0 %	0.7 %

**Global Economy:** Economic activity in the US grew faster than previously estimated in the fourth quarter of 2020, according to revised data released by the Commerce Department on Thursday. The report showed real gross domestic product surged up by 4.3% in the fourth quarter compared to the previously reported 4.1% jump. The US initial jobless claims slid to 684,000, a decrease of 97,000 from the previous week's revised level of 781,000. The jobless claims dropped to their lowest level since hitting 282,000 in the week ended March 14, 2020. Eurozone money supply M3 expanded 12.3% annually in February, slower than the 12.5% rise in January, data from the European Central Bank showed on Thursday. The rate was forecast to remain unchanged at 12.5%. In three months to February, M3 growth averaged 12.4%. The narrower aggregate M1, which comprises currency in circulation and overnight deposits, grew 16.4% versus 16.5% in January. Further, data showed that credit to the private sector grew at a steady pace of 5.1% in February. Similarly, adjusted loans to the private sector expanded 4.5%, the same rate as seen in January. German consumer sentiment is set to rise in April after the easing of the hard lockdown and falling infection rates at the time of the survey, data from market research group GfK showed Thursday. The forward-looking consumer sentiment index improved to -6.2 in April from revised -12.7 in March. With infection rates rising again and the lockdown will be tightened again, it is questionable whether the improvement in consumer confidence will continue, GfK noted. France's business confidence was stable in March, as manufacturers turned optimistic regarding the overall production outlook. The manufacturing business confidence index reading was 98, unchanged from February, survey data from Insee showed Thursday.

**Global Equities:** The US stocks stayed supported on upbeat economic cues and continued buying after recent spate of losses.

**Indian Economy:** Fitch has revised India's GDP growth estimate to 12.8% for next fiscal from the previous 11% on the back of a stronger carryover effect, a looser fiscal stance, and better virus containment, media reports noted. The ratings agency, in its latest Global Economic Outlook GEO, anticipates the level of the country's GDP to remain well below its pre-pandemic forecast trajectory. Fitch also expects GDP growth to ease to 5.8% in Fiscal Year 2023. India launched its 2nd Tranche of auction for commercial coal mining offering 67 mines for sale of coal. This is the highest number of mines on offer in a particular tranche of auction after commencement of the auction regime since 2014.

**Equity Markets:** Key equity indices ended near the day's low on Thursday amid across the board selling pressure. The Nifty ended below the 14,350 mark. Trading was volatile as the March 2021 F&O contracts expired.

**Corporate News:** IT counters could be in focus on sustained losses in the Indian Rupee. The Indian Rupee slipped and closed at 72.62 per US dollar, down 7 paise per dollar on the day. Adani Enterprises has announced its entry into the copper business by incorporating a wholly-owned subsidiary, Kutch Copper Limited (KCL). Rail Vikas Nigam will be under watch. LIC has bought more than 18.18 crore equity shares or 8.72% equity stake in Rail Vikas Nigam via open market transaction on March 24.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(221.6)	174.7	157.4
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)	74,331	72,736	63,150
F&O(INR cr)	9,513,616	4,706,931	2,581,804

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.8	22.3	27.7
NSE VIX	22.7	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	33,006	(0.9) %	81.3 %	Energy	18,133	(2.9) %	68.3 %
IT	25,237	(2.2) %	109.5 %	Pharma	11,817	(0.8) %	68.2 %
Metals	3,718	0.0 %	139.3 %	Finance	15,475	(0.8) %	73.0 %
Auto	9,651	(2.8) %	107.2 %	PSU	2,098	(2.6) %	63.5 %
FMCG	33,213	(2.3) %	26.0 %	Real Estate	323	(2.5) %	87.8 %

### 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>
Tata Steel	723	2.9 %	171.5 %	Info Edg.(	4,403	(6.0) %	118.6 %
Alkem Lab	2,640	2.5 %	16.3 %	Bajaj Hold	3,254	(5.1) %	85.5 %
ICICI Bank	572	0.7 %	83.7 %	Adani Gree	1,227	(5.0) %	702.4 %
Dr Reddy's	4,381	0.7 %	41.5 %	Interglobe	1,664	(4.1) %	66.5 %
Hindustan	267	0.6 %	66.2 %	Punjab Nat	36	(4.1) %	16.6 %

### 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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