



26 Apr.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,341	(0.4) %	(3.5) %
BSE SENSEX	47,878	(0.4) %	(4.3) %
CNX BANK	31,722	(0.2) %	(6.3) %
CNX MIDCAP	23,493	0.3 %	(2.6) %
CNX SMALLCAP	8,251	0.4 %	(0.4) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,043	0.7 %	11.2 %
S&P 500	4,180	1.1 %	11.3 %
FTSE 100	6,939	0.0 %	5.6 %
HANG SENG	29,079	1.1 %	5.8 %
NIKKEI	29,021	(0.6) %	6.5 %
SHANGHAI COMPOSITE	3,474	0.3 %	(0.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.08	(0.4) %	2.9 %
EUR/USD	1.20	0.0 %	(1.9) %
GBP/USD	1.39	(0.3) %	1.7 %
USD/JPY	108.03	(0.0) %	4.7 %
USD/AUD	1.29	(0.0) %	(0.3) %
USD/SGD	1.33	(0.1) %	0.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	1.2 %	30.5 %
Gold(INR/10g)	47,569	0.0 %	(6.7) %
Gold Comex(USD/oz)	1,796	0.4 %	(7.8) %
SILVER(INR/1Kg)	69,875	0.0 %	1.5 %
Aluminium(USD/MT)	2,374	0.0 %	17.9 %
Copper(USD/MT)	9,546	0.7 %	20.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	0.0 %	0.6 %

Global Economy: After reporting a sharp pullback in US new home sales in the previous month, the Commerce Department released a report on Friday showing a substantial rebound in new home sales in the month of March. The report showed new home sales jumped by 20.7% to an annual rate of 1.021 million in March after plunging by 16.2% to a revised rate of 846,000 in February. Germany's private sector growth softened in April as services activity stalled, flash survey data from IHS Markit showed on Friday. The composite output index dropped to 56.0 in April from 57.3 in March. Business activity across the service sector stalled in April following the impact of the pandemic and stricter lockdown measures. The flash services Purchasing Managers' Index or PMI came in at 50.1 in April, down from 51.5 a month ago. The manufacturing PMI also fell to 66.4 from 66.6 in the previous month. UK retail sales volume grew 5.4% month-on-month in March, faster than the 2.2% increase in February, the Office for National Statistics reported Friday. This was the biggest growth since June 2020. Excluding auto fuel, retail sales growth accelerated to 4.9% from 2.5% a month ago. Japan consumer prices were down 0.2% on year in March, following the 0.4% contraction in February, the Ministry of Internal Affairs and Communications said on Friday. Core CPI, which excludes volatile food prices, was down 0.1% on year following the 0.4% decline in the previous month.

Global Equities: The US stocks jumped on Friday as continued optimism about the economic recovery supported the sentiments. Tech stocks surged sharply.

Indian Economy: The kharif or summer sowing has picked up good pace. As on 23rd April 2021, summer sowing in the country is 21.5% higher than it was last year during the corresponding period. The total summer crop area has increased to 73.76 lakh hectares from 60.67 lakh hectares a year ago during the corresponding period. A sharp increase has been seen in the area of pulses. Daily Covid-19 cases continue to spike in India. A total of 3,49,691 new cases were registered on Sunday. Ten States including Maharashtra, Uttar Pradesh, Delhi, Karnataka, Kerala, Chhattisgarh, West Bengal, Tamil Nadu, Gujarat and Rajasthan report 74.53% of the new cases.

Equity Markets: Benchmark indices ended a volatile session with modest losses on Friday. The Nifty closed below the 14,350 level. Selling was triggered by concerns that the spike in COVID-19 cases in the country could derail the economic recovery.

Corporate News: ICICI Bank will be in focus after earnings. The bank reported sharply higher profit at Rs 4,402.6 crore in Q4FY21 against Rs 1,221.4 crore in Q4FY20. Its net interest income jumped to Rs 10,431 crore from Rs 8,928 crore YoY. HCL Technologies reported lower consolidated profit at Rs 2,962 crore in Q4FY21 against Rs 3,982 crore in Q3FY21 while revenue rose to Rs 19,642 crore from Rs 19,302 crore QoQ. The company expects FY22 revenue to grow in double digits in constant currency terms. Tech Mahindra, HDFC Life Insurance Company, SBI Cards and Payment Services, Castrol India, Delta Corp will be watched ahead of latest earnings today.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(120.7)	(84.9)	(84.9)
MF(INR cr)	30.8	96.3	96.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	69,397	69,069	69,069
F&O(INR cr)	2,441,002	4,765,410	4,765,410

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.7	17.4	17.4
NSE VIX	22.7	21.3	21.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,722	(0.2) %	(6.3) %	Energy	17,538	1.0 %	(5.3) %
IT	25,609	(0.8) %	(1.4) %	Pharma	13,320	(0.4) %	7.6 %
Metals	4,447	(0.3) %	6.2 %	Finance	15,238	(0.0) %	(4.2) %
Auto	9,597	(0.5) %	(4.2) %	PSU	1,967	0.3 %	(11.2) %
FMCG	33,726	(0.9) %	(3.3) %	Real Estate	302	(1.1) %	(10.1) %

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>
Muthoot Fi	1,201	4.7 %	(1.1) %	Indus Towe	252	(3.1) %	(1.3) %
ICICI Pru	512	4.0 %	15.3 %	M & M	778	(2.7) %	(3.7) %
Power Grid	211	3.8 %	(3.5) %	Britannia	3,650	(2.7) %	0.9 %
NTPC	103	3.6 %	(5.0) %	GAIL (Indi	129	(2.7) %	(7.7) %
Cadila Hea	571	3.3 %	29.2 %	Dr Reddy's	5,067	(2.6) %	10.4 %

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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