



27 Mar.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	8,641	3.9 %	(25.9) %
BSE SENSEX	29,947	4.9 %	(23.0) %
CNX BANK	19,614	6.1 %	(35.3) %
CNX MIDCAP	11,839	3.1 %	(35.4) %
CNX SMALLCAP	3,551	3.2 %	(47.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,552	6.4 %	(21.0) %
S&P 500	2,630	6.2 %	(18.6) %
FTSE 100	5,816	2.2 %	(23.5) %
HANG SENG	23,352	(0.7) %	(18.2) %
NIKKEI	18,665	(4.5) %	(19.6) %
SHANGHAI COMPOSITE	2,765	(0.6) %	(10.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.30	(0.8) %	5.8 %
EUR/USD	1.10	2.2 %	(2.2) %
GBP/USD	1.20	3.5 %	(9.0) %
USD/JPY	110.01	(0.6) %	1.3 %
USD/AUD	1.67	(3.5) %	17.1 %
USD/SGD	1.44	(1.4) %	6.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	23	(7.7) %	(63.1) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,650	1.1 %	7.0 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,508	0.0 %	(14.9) %
Copper(USD/MT)	4,776	0.5 %	(22.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.8	0.0 %	(1.1) %

Global Economy: US Labor Department released a report on Thursday showing a record spike in first-time claims for unemployment benefits in the week ended March 21st, reflecting the shutdown of large swaths of the US economy due to the coronavirus pandemic. The Labor Department said initial jobless claims skyrocketed to 3,283,000, an increase of 3,001,000 from the previous week's revised level of 282,000. German consumer confidence is likely to decline sharply to the lowest in more than a decade in April as the increase in the number of coronavirus infection cases and the accompanying measures made consumers to take cautious approach, survey data from market research group GfK showed Thursday. The forward-looking consumer confidence index fell to 2.7 from 8.3 in March, testing its lowest level since May 2009. UK retail sales dropped 0.3% on a monthly basis in February, in contrast to a 1.1% rise in January, data from the Office for National Statistics showed Thursday. Excluding auto fuel, retail sales volume decreased 0.5 percent, reversing a 1.8% increase a month ago. On a yearly basis, retail sales volume remained flat after rising 0.9% in January.

Global Equities: US stocks jumped sharply as a recovery from multi-year low extended. DOW spiked more than 6%. The leaders of the Group of 20 or G20 major economies on Thursday pledged to infuse over \$5 trillion into the global economy.

Indian Economy: Finance Minister (FM) Nirmala Sitharaman said that a package worth Rs 1.7 lakh crore is ready for the poor who need immediate help like migrant workers and urban and rural poor. FM announced Pradhan Mantri Gareeb Kalyan Ann Yojna (for next 3 months) in which 80 crore poor people (2/3rd of India's population) are covered. In addition to already allotted 5 kg of rice/wheat per person, an additional 5 kg will be allotted free. Additional 1 kg pulse (according to regional preference) will be given. FM announced an increase of Rs 2000 per worker on average as additional income in MGNREGA (5 crore families benefited). FM said 20 crore women Jan Dhan Yojana account holders will get Rs 500 per month for the next three months.

Equity Markets: The local market extended rally for the third day on Thursday, supported by banks and FMCG stocks. Trading was volatile as the March 2020 F&O contracts expired today, 26 March 2020. The barometer index, the S&P BSE Sensex, jumped 1410.99 points or 4.94% at 29,946.77, as per provisional closing data. The Nifty 50 index was up 335.70 points or 4.04% at 8,653.55.

Corporate News: NTPC said it signed a share-purchase agreement with the central government to acquire North Eastern Electric Power Corporation (NEEPCO) for Rs 4,000 crore and THDC India (THDCIL) for Rs 7,500 crore. The acquisitions are subject to regulatory approvals. Yes Bank said its board has approved raising funds amounting to Rs 5,000 crore, in addition to Rs 10,000 crore cleared in January, through issuance of securities. The board of the bank has also been reconstituted. ICICI Bank entered into an agreement to invest in Auxilo Finserve (previously known as Stellenyak General Finance) by acquiring 9.9% stake, or 34.1 million equity shares for Rs 51.1 crore. Finolex Industries said it has suspended operations at all plants, offices and warehouses located at various locations until 14 April 2020 as per the Centre's order of a complete lockdown in the wake of the coronavirus outbreak.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(497.5)	(471.5)	7.2
MF(INR cr)	(60.3)	1,552.8	353.8

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	51,983	51,920	38,547
F&O(INR cr)	1,446,506	1,287,949	1,409,131

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	64.0	57.6	18.2
NSE VIX	71.5	50.4	18.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,614	6.1 %	(35.3) %	Energy	10,641	0.8 %	(35.6) %
IT	12,536	2.5 %	(20.9) %	Pharma	6,775	1.2 %	(27.7) %
Metals	1,543	0.1 %	(50.3) %	Finance	9,699	5.4 %	(22.4) %
Auto	5,061	2.5 %	(39.8) %	PSU	1,335	0.6 %	(60.6) %
FMCG	25,680	4.9 %	(14.9) %	Real Estate	186	6.1 %	(30.5) %

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>
IndusInd B	436	44.7 %	(75.0) %	NHPC Ltd	18	(4.0) %	(27.3) %
Bandhan Ba	216	39.3 %	(59.3) %	Bank of Ba	56	(3.9) %	(57.8) %
Ashok Leyl	43	24.4 %	(52.6) %	GAIL (Indi	73	(3.2) %	(58.8) %
Piramal En	818	20.0 %	(68.9) %	Vodafone I	3	(3.0) %	(81.7) %
New India	95	15.0 %	(49.8) %	L&T Fin.Ho	54	(2.9) %	(64.8) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Industrial Profits YTD (YoY) (FEB)	27-03-2020	7:00	□CNY	-	-
Tokyo CPI Ex-Fresh Food, Energy (YoY) (MAR)	27-03-2020	5:00	□JPY	-	0.007
BOJ Outright Bond Purchase 1~3 Years	27-03-2020	6:40	□JPY	-	-
ANZ Consumer Confidence (MoM) (MAR)	27-03-2020	2:30	□NZD	-	(0.005)
PCE Core (YoY) (FEB)	27-03-2020	18:00	□USD	-	0.016
U. of Mich. Sentiment (MAR F)	27-03-2020	19:30	□USD	-	95.9
Baker Hughes U.S. Rig Count (MAR 27)	27-03-2020	22:30	□USD	-	772

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