



27 Apr.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,154	(1.7) %	10.9 %
BSE SENSEX	31,327	(1.7) %	10.8 %
CNX BANK	19,587	(3.4) %	7.6 %
CNX MIDCAP	12,696	(2.1) %	10.7 %
CNX SMALLCAP	3,960	(1.9) %	11.8 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,775	1.1 %	(16.7) %
S&P 500	2,837	1.4 %	(12.2) %
FTSE 100	5,752	(1.3) %	(24.4) %
HANG SENG	23,831	(0.6) %	(16.5) %
NIKKEI	19,262	(0.9) %	(17.0) %
SHANGHAI COMPOSITE	2,809	(1.1) %	(9.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.59	0.4 %	6.2 %
EUR/USD	1.08	(0.1) %	(3.8) %
GBP/USD	1.23	(0.0) %	(6.4) %
USD/JPY	107.58	(0.1) %	(1.0) %
USD/AUD	1.57	(0.3) %	10.1 %
USD/SGD	1.43	0.1 %	5.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	17	2.7 %	(72.3) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,746	(0.2) %	13.2 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,473	(0.0) %	(16.9) %
Copper(USD/MT)	5,118	(0.0) %	(17.0) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.6	0.0 %	(1.3) %

Global Economy: The US consumer sentiment fell for a third straight month on the coronavirus pandemic, data released Friday by the University of Michigan showed. The consumer sentiment index tanked to 71.8 in April from 89.1 in March. A report released by the Commerce Department on showed new orders for US manufactured durable goods plunged 14.4% in March of 2020, after rising by a downwardly revised 1.1% in February. The drop in orders in March was the steepest since August 2014. A sharp 41% decline in demand for transportation equipment, due largely to a near 300 percent drop in orders for non-defense aircraft and parts, amid the ongoing coronavirus pandemic, contributed to the fall in new durable goods orders. German business confidence declined to a historic-low in April, survey data from IFO Institute showed Friday. The business confidence index fell to 74.3 in April from 85.9 in March. UK consumer confidence declined sharply amid lockdown in April, as initially estimated, final data from GfK showed. The consumer confidence index fell to -34 from -9 in March. Russia's central bank reduced its key interest rate to 5.50% from 6.00%.

Global Equities: US stocks edged up further in last session as President Donald Trump signed a \$484 billion stimulus package for small-business lending and direct money to hospitals.

Indian Economy: Scheduled commercial banks (SCBs) credit growth improved on sequential basis to 7.2% YoY to Rs 10339299 crore as on 10 April 2020, compared with 6.1% growth a fortnight ago. The credit growth has decelerated from 13.0% at end April 2019. Non-food credit, accounting for 99.5% of the share of the total credit, recorded a growth of 7.0%, YoY, at Rs 10285226 crore as on 10 April 2020 as against a rise of 6.1% fortnight ago and 13.1% rise a year ago. Ministry of Home Affairs (MHA), on 15.04.2020, had issued an order to exempt certain activities under the consolidated revised guidelines to fight COVID-19, in certain areas not included in hotspots/containment zones. Giving relaxation in the category of Commercial and private establishments, MHA has issued an order to all States/UTs, to allow opening of all shops registered under Shops & Establishment Act of respective States/ UTs, including shops in residential complexes, neighborhood & standalone shops.

Equity Markets: Domestic shares corrected on Friday, tracking negative cues from global stock markets. The Nifty ended below the 9,200 mark. Financial stocks witnessed major selling while pharma stocks bucked trend. The barometer S&P BSE Sensex, tumbled 535.86 points or 1.68% at 31,327.22. The Nifty 50 index slipped 159.50 points or 1.71% at 9,154.40. In the broader market, the S&P BSE Mid-Cap index fell 1.77% while the S&P BSE Small-Cap index lost 1.40%.

Corporate News: Metal counters can stay supported on firm Copper prices. COMEX Copper futures edged up near five week high of \$2.36 per pound on steady gains in equities. Bank of Baroda board approved raising of additional capital fund up to Rs 13,500 crore upto March 31, 2021. IT firm Mindtree noted that in FY20Q4, it's profit rose 4.7% to Rs 206.2 crore while revenue increased 4.3% to Rs 2,050.5 crore QoQ. Tata Steel board approved the issue of additional debt securities (NCDs) up to Rs 5,000 crore on private placement basis.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	63.4	(32.7)	(32.7)
MF(INR cr)	358.6	(532.2)	(532.2)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	55,502	44,348	44,348
F&O(INR cr)	637,107	1,086,630	1,086,630

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	35.9	43.4	43.4
NSE VIX	39.1	47.8	47.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	19,587	(3.4) %	7.6 %	Energy	12,501	0.5 %	16.1 %
IT	12,816	(2.4) %	6.4 %	Pharma	9,518	1.4 %	35.5 %
Metals	1,645	(2.9) %	5.9 %	Finance	9,432	(3.8) %	5.5 %
Auto	5,377	(1.6) %	15.5 %	PSU	1,263	(3.7) %	(1.6) %
FMCG	28,637	(0.5) %	8.6 %	Real Estate	178	(4.2) %	3.3 %

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>
Lupin	877	6.7 %	51.5 %	Bajaj Fin.	1,976	(9.0) %	(11.0) %
Britannia	3,062	3.9 %	19.4 %	Bharti Inf	152	(8.5) %	(2.0) %
Shriram Tr	668	3.8 %	7.5 %	Vodafone I	4	(8.0) %	31.1 %
Reliance I	1,417	3.4 %	31.1 %	Zee Entert	145	(7.9) %	20.1 %
Biocon	357	2.8 %	28.4 %	HDFC Life	453	(7.2) %	5.5 %

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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