



28 Apr.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,282	0.0 %	12.5 %
BSE SENSEX	31,743	1.3 %	13.7 %
CNX BANK	20,081	0.0 %	10.3 %
CNX MIDCAP	12,894	0.0 %	12.4 %
CNX SMALLCAP	3,992	0.0 %	12.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,134	1.5 %	(15.4) %
S&P 500	2,878	1.5 %	(10.9) %
FTSE 100	5,847	1.6 %	(23.1) %
HANG SENG	24,280	1.9 %	(14.9) %
NIKKEI	19,783	2.7 %	(14.7) %
SHANGHAI COMPOSITE	2,816	0.3 %	(8.7) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.55	0.4 %	6.1 %
EUR/USD	1.08	0.4 %	(3.4) %
GBP/USD	1.24	0.6 %	(5.8) %
USD/JPY	107.27	(0.4) %	(1.3) %
USD/AUD	1.55	(1.5) %	8.7 %
USD/SGD	1.42	(0.3) %	5.5 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	13	(24.6) %	(79.1) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,720	(1.5) %	11.5 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,473	(0.0) %	(16.9) %
Copper(USD/MT)	5,166	0.9 %	(16.2) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.7	0.1 %	(1.3) %

**Global Economy:** China's industrial profit dropped sharply in March but at a slightly slower pace than seen in the first two months of 2020 following coronavirus outbreak, data from the National Bureau of Statistics showed Monday. Industrial profits declined 34.9% year-on-year in March following a 38.3% fall in January to February period. Profits totaled CNY 370.6 billion in March. In the first quarter, industrial profits saw a sharp drop of 36.7% from the same period last year. China's industrial profit dropped sharply in March but at a slightly slower pace than seen in the first two months of 2020 following coronavirus outbreak, data from the National Bureau of Statistics showed Monday. Industrial profits declined 34.9% year-on-year in March following a 38.3% fall in January to February period. Profits totaled CNY 370.6 billion in March. In the first quarter, industrial profits saw a sharp drop of 36.7% from the same period last year.

**Global Equities:** US stocks added to latest gains and hit around one month high as markets focussed on possibility of additional stimulus ahead of Federal Reserve meeting later this week.

**Indian Economy:** Heightened volatility in capital markets in reaction to COVID-19 has imposed liquidity strains on mutual funds (MFs), which have intensified in the wake of redemption pressures related to closure of some debt MFs and potential contagious effects therefrom. With a view to easing liquidity pressures on MFs, it has been decided to open a special liquidity facility for mutual funds of Rs 50,000 crore. Under the SLF-MF, the RBI shall conduct repo operations of 90 days tenor at the fixed repo rate. Liquidity support availed under the SLF-MF would be eligible to be classified as held to maturity (HTM) even in excess of 25% of total investment permitted to be included in the HTM portfolio.

**Equity Markets:** Domestic barometers ended with decent gains on Monday, supported by rally in financial stocks. The barometer S&P BSE Sensex, gained 415.86 points or 1.33% at 31,743.08. The Nifty 50 index rose 127.90 points or 1.40% at 9,282.30.

**Corproate News:** Reliance Industries (RIL) said that the meeting of the board of directors of the company is scheduled on 30 April 2020 to consider a proposal to issue equity shares to existing shareholders on rights basis, as may be permitted under applicable law, subject to such regulatory/statutory approvals, as may be required. IndusInd Bank's net profit fell 16.17% to Rs 301.84 crore on 21.29% rise in total income to Rs 9158.57 crore in Q4 March 2020 over Q4 March 2019. The private lender's profit before tax (PBT) contracted 21.92% to Rs 395.85 crore in Q4 March 2020 from Rs 507 crore in Q4 March 2019. The result was announced after market hours yesterday, 27 April 2020. Ambuja Cements' consolidated net profit after tax and minority interest rose 11.9% to Rs 554 crore on 8.44% fall in sales to Rs 6129 crore in Q1 March 2020 over Q1 March 2019.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(16.4)	(31.4)	(31.4)
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)	2,013	37,992	37,992
F&O(INR cr)	715,979	1,061,920	1,061,920

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	35.9	43.4	43.4
NSE VIX	38.0	47.1	47.1

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,081	2.5 %	10.3 %	Energy	12,582	0.6 %	16.8 %
IT	13,121	2.4 %	8.9 %	Pharma	9,602	0.9 %	36.7 %
Metals	1,667	1.3 %	7.3 %	Finance	9,628	2.1 %	7.7 %
Auto	5,433	1.0 %	16.7 %	PSU	1,268	0.4 %	(1.2) %
FMCG	29,053	1.5 %	10.2 %	Real Estate	180	1.4 %	4.6 %

### 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>
ICICI Pru	378	12.2 %	10.2 %	Shriram Tr	642	(3.9) %	3.3 %
HDFC Life	485	6.9 %	12.8 %	Hind.Zinc	165	(3.4) %	3.1 %
New India	122	6.8 %	15.4 %	Marico	297	(2.9) %	11.9 %
Motherson	77	6.7 %	32.5 %	Interglobe	871	(2.3) %	(12.8) %
IndusInd B	407	6.4 %	19.0 %	ACC	1,138	(1.6) %	18.1 %

### 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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