



29 Apr.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,381	1.1 %	13.7 %
BSE SENSEX	32,115	1.2 %	13.6 %
CNX BANK	20,671	2.9 %	13.5 %
CNX MIDCAP	13,061	1.3 %	13.9 %
CNX SMALLCAP	4,022	0.7 %	13.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,102	(0.1) %	(15.5) %
S&P 500	2,863	(0.5) %	(11.4) %
FTSE 100	5,959	1.9 %	(21.6) %
HANG SENG	24,576	1.2 %	(13.9) %
NIKKEI	19,771	(0.1) %	(14.8) %
SHANGHAI COMPOSITE	2,810	(0.2) %	(8.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.34	(0.3) %	5.8 %
EUR/USD	1.08	0.5 %	(3.4) %
GBP/USD	1.24	0.8 %	(5.6) %
USD/JPY	106.96	(0.6) %	(1.6) %
USD/AUD	1.54	(1.7) %	8.2 %
USD/SGD	1.42	(0.5) %	5.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	12	(3.4) %	(79.8) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,732	0.7 %	12.3 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,465	(0.5) %	(17.3) %
Copper(USD/MT)	5,170	0.1 %	(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	0.6	(0.0) %	(1.3) %

Global Economy: US cases of the novel coronavirus approached 1 million mark on Tuesday, having doubled in 18 days, Consumer confidence in the US fell significantly in the month of April, according to a report released by the Conference Board on Tuesday. The Conference Board said its consumer confidence index plunged to 86.9 in April after tumbling to a downwardly revised 118.8 in March. Singapore's recovery prospects were dampened by the coronavirus, or COVID-19, pandemic as it has undermined spending as well as production, the central bank said Tuesday. GDP growth forecast range was downgraded and widened, to -4.0 to -1.0% from -0.5 to 1.5% previously, the Monetary Authority of Singapore said in its biannual Macroeconomic Review.

Global Equities: US stocks saw resistance around one month top amid poor economic cues. European markets moved up as investors eyed corporate earnings.

Indian Economy: Global rating agency Fitch on Tuesday sharply cut India's GDP growth rate to 0.8% during current fiscal, which is the lowest growth projection so far. This slide is reflecting the impact of the coronavirus pandemic and official efforts to contain it. This is down sharply from previous forecast of 5.6%. Moody's also cut its forecast for India's GDP growth for the current financial year to just 0.2. The forecast is a downward revision of its March projection, when Moody's had predicted a 2.5% growth for India's economy.

Equity Markets: Domestic shares rallied on Tuesday, buoyed by positive global cues. Financial stocks extended gains for the second day, following the Reserve Bank of India (RBI) offering liquidity support to mutual funds for meeting the liquidity requirements. The barometer S&P BSE Sensex advanced 371.44 points or 1.17% at 32,114.52. The Nifty 50 index gained 98.60 points or 1.06% at 9,380.90. The gains were also supported by expectations that India will ease the lockdown following similar lifting of restrictions in Italy, New Zealand and some US states. Prime Minister Modi on Monday (27 April) held talks with the chief ministers of the country's 28 states to decide on a graded exit from the ongoing lockdown which is in place till 3 May.

Corporate News: Axis Bank reported a loss of Rs 1,387.78 crore for the quarter ended March 2020 due to spike in provisions. The bank had reported a profit at Rs 1,505.06 crore in corresponding period last year and Rs 1,757 crore in December quarter. Net interest income, the difference between interest earned and expended, increased 19.3% year-on-year to Rs 6,807.74 crore while advances rose 15% YoY to Rs 5,71,424 crore. Natco Pharma it has received the final approval from the US health regulator for its first supplemental abbreviated new drug application (sANDA) filed from its new drug formulations facility at Visakhapatnam, Andhra Pradesh. Vardhman Group has resumed manufacturing partially across all its manufacturing locations in Punjab, Himachal Pradesh and Madhya Pradesh while fully adhering to government's guidelines to curb Covid-19.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(101.2)	(36.4)	(36.4)
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)	53,036	38,933	38,933
F&O(INR cr)	904,462	1,052,078	1,052,078

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	33.3	42.8	42.8
NSE VIX	35.4	46.4	46.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	20,671	2.9 %	13.5 %	Energy	12,548	(0.3) %	16.5 %
IT	13,134	0.1 %	9.0 %	Pharma	9,386	(2.2) %	33.6 %
Metals	1,662	(0.3) %	7.0 %	Finance	9,951	3.4 %	11.3 %
Auto	5,447	0.3 %	17.0 %	PSU	1,284	1.3 %	0.0 %
FMCG	28,778	(0.9) %	9.2 %	Real Estate	182	0.8 %	5.5 %

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	468	14.9 %	36.8 %	Lupin	854	(4.7) %	47.5 %
Bajaj Fin.	2,228	9.0 %	0.4 %	General In	132	(3.8) %	25.8 %
Shriram Tr	695	8.3 %	11.8 %	Sun Pharma	474	(3.3) %	38.0 %
H D F C	1,716	7.8 %	8.4 %	Biocon	352	(3.1) %	26.4 %
Axis Bank	455	6.6 %	27.0 %	Colgate-Pa	1,506	(3.0) %	21.2 %

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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