



29 Apr.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,865	0.0 %	(0.0) %
BSE SENSEX	49,734	1.6 %	(0.6) %
CNX BANK	33,723	0.0 %	(0.4) %
CNX MIDCAP	24,314	0.0 %	0.8 %
CNX SMALLCAP	8,543	0.0 %	3.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,820	(0.5) %	10.5 %
S&P 500	4,183	(0.1) %	11.4 %
FTSE 100	6,964	0.3 %	6.0 %
HANG SENG	29,071	0.5 %	5.8 %
NIKKEI	29,054	0.2 %	6.6 %
SHANGHAI COMPOSITE	3,457	0.4 %	(1.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.62	(0.2) %	2.3 %
EUR/USD	1.21	(0.1) %	(1.5) %
GBP/USD	1.39	0.2 %	1.8 %
USD/JPY	108.45	0.5 %	5.1 %
USD/AUD	1.29	(0.4) %	(0.9) %
USD/SGD	1.33	(0.1) %	0.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	1.5 %	34.1 %
Gold(INR/10g)	47,569	0.0 %	(6.7) %
Gold Comex(USD/oz)	1,790	0.7 %	(8.2) %
SILVER(INR/1Kg)	69,875	0.0 %	1.5 %
Aluminium(USD/MT)	2,393	0.1 %	18.8 %
Copper(USD/MT)	9,833	(0.7) %	24.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	1.5 %	0.7 %

Global Economy: The US Fed left interest rates unchanged and remained committed to its bond-buying program. The Fed says the US economy is still a long way from full employment and that any inflationary effects are likely to be transitory. Some sectors hit by the pandemic are still weak but are improving. The Fed says the US economy is still a long way from full employment and that any inflationary effects are likely to be transitory. Fed Chief Jerome Powell stated that it is not time yet for bond purchase taper talk. German forward-looking consumer sentiment index fell to -8.8 in May from revised -6.1 in April, as rising cases of infections and the tightening of the lockdown weigh on consumption, survey results from the market research group GfK showed on Wednesday. UK shop prices continued to decline in April, data from the British Retail Consortium showed on Wednesday. The shop price index dropped 1.3% year-on-year in April, following a 2.4% drop in March. Both food and non-food prices declined in April. The fall in food prices was the result of fewer promotions compared to previous year. Japan retail sales climbed 5.2% on year in March, coming in at 13.498 trillion yen, the Ministry of Economy, Trade and Industry said on Wednesday following the 1.5% decline in the previous month. On a monthly basis, retail sales climbed 1.2% after advancing 3.1% in February. Economic growth in developing Asia is set to rebound to 7.3% this year, supported by a healthy global recovery and early progress on coronavirus disease (COVID-19) vaccines, according to a new report from the Asian Development Bank (ADB). The projected resurgence follows a 0.2% contraction last year, according to ADB. The region's growth is forecast to moderate to 5.3% in 2022. Excluding the newly industrialized economies of Hong Kong, China; the Republic of Korea; Singapore; and Taipei, China, developing Asia's economic activity is expected to grow 7.7% this year and 5.6% in 2022.

Global Equities: The S&P 500 rose to a record high on Wednesday as the Fed remained fully supportive for the economy.

Indian Economy: The ADB estimates India's gross domestic product (GDP) growth to see a sharp bounce of 11% in current fiscal on the back of continued economic recovery boosted by increased public investment, vaccine rollout and surge in domestic demand. However, the recent surge in COVID-19 cases may put this recovery at risk. India's GDP is expected to expand 7.0% in FY2022. ADB noted that the strong recovery in India is being driven by an economy normalizing from last year's deep contraction – and this will be backed by a large COVID-19 vaccine rollout. A sharp increase in capital expenditure and accommodative financial policies will also support the rebound. Rising demand in the US supported by the fiscal stimulus package will help India's growth, as the US is its largest export market.

Equity Markets: Benchmark indices rallied for the third trading session and ended near the day's high on Wednesday. Banks, financials and auto stocks rallied while metal and pharma shares corrected. The Nifty closed above the 14,850 mark.

Corporate News: Tata Communications reported profit of Rs 299.23 crore in Q4FY21 against loss at Rs 274.99 crore in Q4FY20. Its revenue fell to Rs 4,073.25 crore from Rs 4,397.89 crore YoY. Bombay Dyeing & Manufacturing Company reported loss at Rs 166.74 crore in Q4FY21 against profit at Rs 48.57 crore in Q4FY20. Its revenue rose to Rs 497 crore from Rs 313.1 crore YoY. The Ministry of Road Transport has issued a notification of draft rules, which would make it much easier for those shifting from one state to another to re-register their vehicles.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(148.7)	(98.6)	(98.6)
MF(INR cr)	1,273.5	260.8	260.8

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	78,701	69,611	69,611
F&O(INR cr)	4,353,206	4,497,106	4,497,106

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.6	17.4	17.4
NSE VIX	22.6	21.6	21.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	33,723	3.0 %	(0.4) %	Energy	17,991	0.6 %	(2.8) %
IT	25,962	0.6 %	(0.1) %	Pharma	13,253	(0.3) %	7.1 %
Metals	4,645	(0.3) %	10.9 %	Finance	16,040	2.9 %	0.8 %
Auto	9,872	1.7 %	(1.5) %	PSU	2,101	2.6 %	(5.1) %
FMCG	34,129	0.4 %	(2.1) %	Real Estate	312	(0.6) %	(7.0) %

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>
Bajaj Fina	5,281	8.5 %	0.2 %	HDFC AMC	2,806	(2.1) %	(5.3) %
Eicher Mot	2,521	5.0 %	(4.2) %	Biocon	391	(1.8) %	(4.8) %
IndusInd B	927	5.0 %	(6.7) %	Britannia	3,479	(1.8) %	(3.9) %
SBI Cards	993	4.0 %	1.9 %	Jubilant F	2,902	(1.7) %	(1.7) %
Bajaj Fins	10,489	3.9 %	7.1 %	ICICI Pru	521	(1.1) %	17.2 %

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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