



31 Mar.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	8,281	(4.4) %	(29.0) %
BSE SENSEX	28,440	(4.6) %	(26.8) %
CNX BANK	18,782	(5.9) %	(38.1) %
CNX MIDCAP	11,446	(2.7) %	(37.6) %
CNX SMALLCAP	3,488	(2.2) %	(48.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,327	3.2 %	(21.8) %
S&P 500	2,627	3.4 %	(18.7) %
FTSE 100	5,564	1.0 %	(26.8) %
HANG SENG	23,175	(1.3) %	(18.8) %
NIKKEI	19,085	(1.6) %	(17.8) %
SHANGHAI COMPOSITE	2,747	(0.9) %	(11.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.10	(0.3) %	5.5 %
EUR/USD	1.11	0.8 %	(1.4) %
GBP/USD	1.24	3.3 %	(6.0) %
USD/JPY	107.83	(2.0) %	(0.8) %
USD/AUD	1.63	(2.6) %	14.0 %
USD/SGD	1.43	(0.9) %	5.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	20	(6.6) %	(67.2) %
Gold(INR/10g)	40,989	0.0 %	5.1 %
Gold Comex(USD/oz)	1,639	(0.8) %	6.3 %
SILVER(INR/1Kg)	36,871	0.0 %	(19.9) %
Aluminium(USD/MT)	1,495	(0.7) %	(15.6) %
Copper(USD/MT)	4,763	(0.2) %	(22.7) %

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	0.0 %	(1.2) %

Global Economy: The US pending home sales index rose by 2.4% to 111.5 in February after spiking by 5.3% to an upwardly revised 108.9 in January. China's central bank reduced its reverse repurchase rate unexpectedly by 20 basis points on Monday. The People's Bank of China decided to lower the 7-day reverse repo rate to 2.20% from 2.40%. The central bank injected CNY 50 billion into the financial system. The bank said it will maintain sufficient liquidity in the system to underpin economic activity. Earlier this month, the central bank had reduced the reserve requirement ratio for qualified banks with effect from March 16, releasing CNY 550 billion into the financial system. Eurozone economic confidence logged its strongest monthly decline on record in March as the spread of coronavirus weighed across all sectors. According to the monthly survey from the European Commission, the economic confidence index fell sharply to 94.5 in March from 103.4 in February. However, the reading was above economists' forecast of 91.6. The EU said the data published today may be less accurate as the survey responses were collected between February 26 and March 23 in the context of the fight against the coronavirus. UK mortgage approvals rose to 73,546 in February from 71,344 in January, data from the Bank of England showed Monday. This was the highest level since January 2014. Consumer credit fell to GBP 0.9 billion in February, slightly below the GBP 1.1 billion average seen since July 2018. In February, UK businesses borrowed GBP 1.3 billion from banks and financial markets. This was the strongest for five months.

Global Equities: The US stocks jumped as President Donald Trump extended national social distancing guidelines until at least April 30th. DOW added more than 3%.

Indian Economy: The RBI noted that in view of the rapidly evolving financial conditions and taking into account the impact of disruptions caused by COVID-19, it has been decided as an interim measure to extend the window timings of Fixed Rate Reverse Repo and MSF operations to provide eligible market participants with greater flexibility in their liquidity management. The new window timings for Fixed Rate Reverse Repo and MSF operations would be from 9.00 AM to 23.59 PM as compared to 17.30 PM to 23.59 PM. These changes will come into effect from March 31, 2020 and will be applicable till April 30, 2020. All other terms and conditions as applicable to LAF Reverse Repo and MSF operations will remain the same. RBI decided to conduct another TLTRO for Rs 25,000 crore for a tenor of three years on April 3rd 2020.

Equity Markets: Domestic shares tumbled on Monday as the coronavirus pandemic continue to spook investors. The Nifty ended below the 8300 mark. The barometer index, the S&P BSE Sensex, slumped 1375.27 points or 4.61% at 28,440.32. The Nifty 50 index shed 370.90 points or 4.28% at 8,289.35. The broader market was under pressure. The S&P BSE Mid-Cap index slipped 2.13% while the S&P BSE Small-Cap index shed 1.75%.

Corporate News: Bharti Airtel announced measures--unrestricted incoming services till 17 April and Rs 10 talk time--to cover more than 80 million low-income mobile customers from the impact of the coronavirus crisis. Piramal Enterprises said the Administrative Committee of the board of directors has approved the allotment of 7,500 secured, rated, unlisted, redeemable non-convertible debentures having a face value of Rs 10,00,000 each, aggregating up to Rs 750 crore. Vedanta said its mining operations, which manufacture essential commodities, and the oil & gas business will continue across all sites during the lockdown imposed by the Centre to contain the spread of coronavirus.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	137.5	(411.4)	7.7
MF(INR cr)	(1,252.3)	1,354.9	354.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	2,182	49,903	38,492
F&O(INR cr)	461,006	1,203,656	1,401,293

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	65.5	58.2	18.6
NSE VIX	71.9	52.5	19.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	18,782	(5.9) %	(38.1) %	Energy	10,401	(2.1) %	(37.1) %
IT	12,319	(2.0) %	(22.2) %	Pharma	6,896	1.2 %	(26.4) %
Metals	1,508	(3.0) %	(51.4) %	Finance	9,031	(7.4) %	(27.8) %
Auto	4,669	(5.5) %	(44.5) %	PSU	1,295	(3.3) %	(61.7) %
FMCG	25,832	0.4 %	(14.4) %	Real Estate	172	(7.3) %	(35.8) %

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>
New India	112	13.7 %	(40.6) %	Shriram Tr	609	(16.0) %	(50.7) %
Oracle Fin	1,943	8.0 %	(42.7) %	Bandhan Ba	216	(13.3) %	(59.2) %
Cipla	432	5.9 %	(17.9) %	Bajaj Fin.	2,242	(11.8) %	(25.3) %
Torrent Ph	1,960	5.4 %	3.2 %	H D F C	1,559	(11.1) %	(20.5) %
ICICI Pru	334	4.8 %	(8.0) %	Havells In	467	(8.6) %	(39.7) %

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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