



31 Mar.2021

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,845	2.3 %	79.9 %
BSE SENSEX	50,137	2.3 %	77.4 %
CNX BANK	33,875	1.7 %	86.0 %
CNX MIDCAP	23,609	1.7 %	105.8 %
CNX SMALLCAP	8,084	1.3 %	128.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,067	(0.3) %	8.0 %
S&P 500	3,959	(0.3) %	5.4 %
FTSE 100	6,772	0.5 %	3.0 %
HANG SENG	28,578	0.8 %	4.0 %
NIKKEI	29,433	0.2 %	8.0 %
SHANGHAI COMPOSITE	3,457	0.6 %	(1.3) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.76	(0.0) %	(0.3) %
EUR/USD	1.18	(0.3) %	(3.8) %
GBP/USD	1.37	0.0 %	0.5 %
USD/JPY	109.07	0.4 %	5.7 %
USD/AUD	1.32	0.2 %	1.5 %
USD/SGD	1.35	0.1 %	1.9 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	1.0 %	29.3 %
Gold(INR/10g)	44,331	(0.5) %	(13.1) %
Gold Comex(USD/oz)	1,715	(1.1) %	(12.0) %
SILVER(INR/1Kg)	63,666	(1.6) %	(7.5) %
Aluminium(USD/MT)	2,256	(0.2) %	12.0 %
Copper(USD/MT)	8,943	0.2 %	12.9 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	0.1 %	0.8 %

**Global Economy:** Consumer confidence in the US jumped in the month of March, according to a report released by the Conference Board on Tuesday. The Conference Board said its consumer confidence index spiked to 109.7 in March from a downwardly revised 90.4 in February. Eurozone economic confidence improved in March with a magnitude of growth that was fastest since last summer's steep recovery after the first phase of the Covid-19 pandemic, survey results from the European Commission showed on Tuesday. The economic sentiment index climbed to 101.0 in March from 93.4 in the previous month. Germany's consumer price inflation accelerated in March mainly due to higher energy prices, provisional data from Destatis showed on Tuesday. Consumer prices rose 1.7% year-on-year in March, faster than the 1.3% rise in February. The total value of retail sales in Japan was down 1.5% on year in February, the Ministry of Economy, Trade and Industry said on Tuesday - coming in at 11.628 trillion yen. This followed the 2.4% drop in the previous month.

**Global Equities:** The US stocks slipped amid broad worries over risk appetite as the US dollar firmed up and treasury yields rallied.

**Indian Economy:** The Central Government has released GST Compensation of Rs. 30,000 crore to States as part compensation admissible for FY 2020-21 on 27th March, 2021. The total amount of compensation released so far for the year 2020-21 is Rs. 70,000 crore. As per the decision of GST Council, back to back loan of Rs. 1,10,208 crore has also been released in lieu of shortfall in release of GST Compensation for FY 2020-21. In addition to above, Centre has also released Rs. 28,000 crore (Rs. 14,000 crore to States and Rs. 14,000 crore to Centre) by way of adhoc settlement of IGST on 30th March' 2021.

**Equity Markets:** The domestic equity benchmarks ended with robust gains on Tuesday, mirroring firm global stocks. The Nifty managed to close near 14,850 level. Barring the Nifty Realty index, all the sectoral indices on the NSE ended in green.

**Corporate News:** The United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP) said on Tuesday that India's economic output in 2021 is expected to remain below the 2019 level. India is estimated to record an economic growth of 7 per cent in 2021-22, over a contraction of 7.7 per cent witnessed in the previous fiscal. UltraTech Cement said it has prepaid its long-term loans of Rs 5,000 crore. The loan repayment has been done through free cash flows that the company has generated over the last few quarters despite the pandemic. Larsen & Toubro's construction arm has bagged orders which are collectively in the range Rs 1,000 crore - Rs 2,500 crore, the engineering major said on Tuesday.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	54.6	138.3	154.7
MF(INR cr)	(153.9)	(11.2)	(522.2)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	72,256	72,199	63,185
F&O(INR cr)	2,797,459	4,483,356	2,580,912

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	20.7	22.0	27.6
NSE VIX	20.7	22.1	25.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	33,875	1.7 %	86.0 %	Energy	18,419	1.1 %	71.0 %
IT	26,121	2.9 %	116.8 %	Pharma	12,207	2.7 %	73.7 %
Metals	3,963	2.8 %	155.1 %	Finance	16,038	2.0 %	79.3 %
Auto	9,865	1.0 %	111.8 %	PSU	2,130	0.7 %	66.0 %
FMCG	34,579	2.2 %	31.2 %	Real Estate	329	(0.0) %	90.9 %

### 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>
Oracle Fin	3,357	7.4 %	74.7 %	General In	184	(9.4) %	74.5 %
UPL	628	7.3 %	105.4 %	Info Edg.(	4,158	(7.0) %	106.5 %
Indus Towe	255	6.1 %	64.2 %	Hindustan	262	(5.7) %	63.4 %
L & T Info	4,163	5.5 %	199.0 %	Adani Gree	1,158	(4.5) %	657.1 %
JSW Steel	467	5.0 %	226.9 %	Power Fin.	111	(3.0) %	25.0 %

### 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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