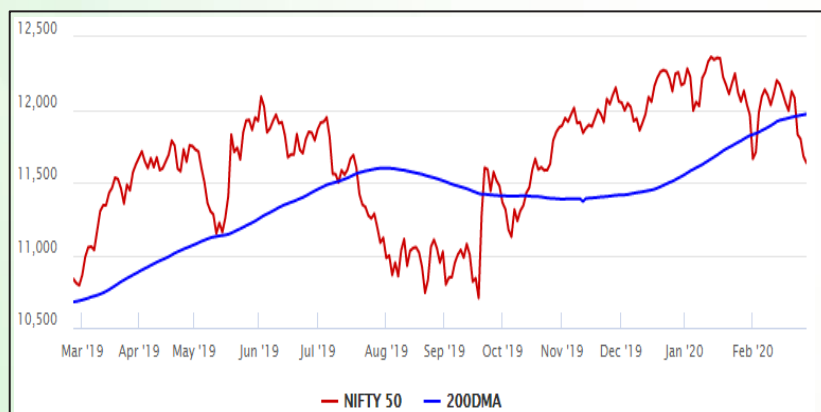


Equity Market

- ❖ Sensex slides for 5th day, sheds 143 points to close at 39,746
- ❖ Expiry of February derivatives contracts, global selloff, worries over Q3 GDP kept the market volatile
- ❖ Nifty P/E at 26.48, Nifty Midcap 100 P/E at 25.91

S&P CNX Nifty - 200 DMA



Nifty Equity Benchmark Indices

Index	Current Value	%chg	52 wkhigh	52 wklow
Nifty 50	11633.3	-0.39	12430.5	10637.2
Nifty Mid cap 100	17369.5	-0.82	18495.9	14975.8
Nifty Small cap 100	5912.1	-1.33	6822.5	5114.6
Bank	30187.0	-0.40	32613.1	26560.6
Auto	7178.9	-0.40	9059.4	6727.6
FMCG	29981.2	0.05	32644.9	28099.2
Pharma	7885.2	0.59	9578.4	7047.1
Realty	290.3	-2.42	336.4	229.5

Factors driving the market

- ❖ Coronavirus cases outside China continues to spread
- ❖ Barring Pharma and FMCG all indices ended in red
- ❖ PSU Banks, media stocks take the biggest knock

Nifty Top Gainers/Losers

Index	Value	52 wkhigh	52 wklow
Top Gainers			
Sun Pharma	388.0	484.3	344.6
Britannia	3100.0	3583.8	2300.0
Titan	1278.5	1390.0	998.0
Top Losers			
Wipro	231.5	301.6	230.5
ONGC	92.9	178.9	92.1
JSW Steel	252.9	314.0	201.8

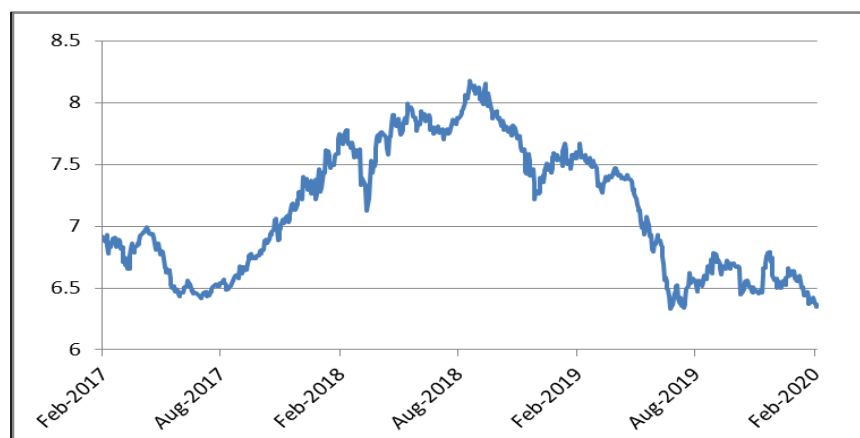
Equity FPI Inflows

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
27-Feb-20	5824.7	8957.0	(3132.3)
26-Feb-20	5723.8	7562.0	(1838.2)
25-Feb-20	5997.7	7733.3	(1735.7)
Total Jan-2020	116261.5	104139.0	12122.6
Total Dec-2019	110961.4	103623.0	7338.4
Total 2019	1437559.6	1336438.9	101120.8

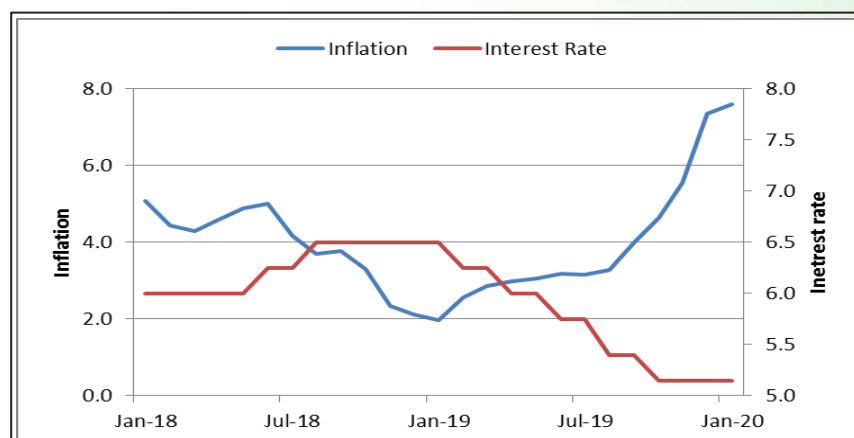
Debt Market

- ❖ Real estate loans worth Rs 20,000 crore may come up for restructuring after RBI's ruling
- ❖ All pending MSME loans to be restructured by March 15: Nirmala Sitharaman
- ❖ RBI flags risks to banks, inflation in telecom crisis
- ❖ Tata Motors gets nod to raise Rs 500 cr through NCDs

10-year G-sec yield



Inflation vs. Interest rate



Debt FPI Inflows

Debt Watch	Percent
Call rate	4.79
Repo rate	5.15
10 Yr Gsec yield	6.38
1-mth CP rate	5.32
3-mth CP rate	5.65
6-mth CP rate	5.98
1 Yr CP rate	6.16
1-mth CD rate	5.14
3-mth CD rate	5.42
6-mth CD rate	5.59
1 Yr CD rate	5.75

Auctions / Money Market Operation		
Date	Description	Amount(Cr)
Feb-28	G-sec auction	--
Feb-28	Total repo (outstanding)	--
Feb-28	Total reverse repo (outstanding)	2,68,693
Feb-28	Marginal standing facility (outstanding)	4,534
Feb-28	GOI surplus cash balance with RBI	--

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
27-Feb-20	863.6	3080.6	(2217.0)
26-Feb-20	698.0	758.1	(60.1)
25-Feb-20	1507.3	4694.4	(3187.1)
Total Jan-2020	25926.9	37574.9	(11648.0)
Total Dec-2019	33541.7	38157.9	-4616.3
Total 2019	392458.9	366578.5	25880.4

Debt Fund Benchmark Indices

Market Indices	1 M (%)	1 Yr (%)	3 Yr (%)	5 Yr (%)
Crisil Composite Bond Fund Index	2.15	14.07	8.34	8.72
Crisil Short Term Bond Fund Index	1.32	10.70	7.93	8.29
Crisil ST Debt Hybrid 75+25 Index	-0.06	10.34	8.49	8.25
Crisil Liquid Fund Index	0.47	6.56	6.98	7.27

Macro

- ❖ New Zealand will look for bilateral trade talks with India if it does not join RCEP
- ❖ Odisha plans four new 500 acre industrial townships
- ❖ India Ratings lowers domestic steel sector outlook for FY21 to negative
- ❖ COAI seeks easier payment terms for telcos in AGR dues, cut in licence fee
- ❖ Government's new audit rules to shield companies against financial frauds

	Q2 FY2020(%)	Q1 FY2020(%)	Q2 FY2019(%)
GDP growth	4.5	5.01	7.00

Commodity Prices				
	Current	Week ago	Month ago	Year ago
Brent crude(\$/bbl)	52.18	59.31	59.32	66.39
Gold (RS/10 gms)	42,451	41,493	40,638	33,418

	Dec-2019 (%)	Nov-2019 (%)	Year ago (%) (Dec-2018)
CPI	7.35	5.54	2.11
WPI	2.59	0.58	3.46
Core Sector Output	1.30	-1.50	2.10

Global market trends

- ❖ Dow Jones posts record drop of 1191 points over the economic impact of coronavirus
- ❖ MSCI all country world index fell 3.3%
- ❖ Asian markets extend losses, Japan temporarily shuts all schools to halt virus spread
- ❖ Brent crude falls again

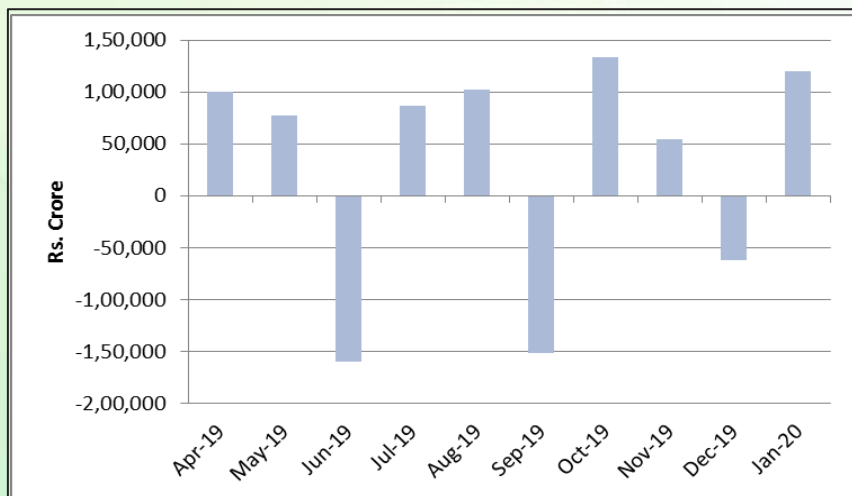
INR vs Global currency		
	Current	Prev close
USD	71.99	71.94
GBP	92.76	92.66
Euro	79.15	79.02
Yen	0.66	0.66
Yuan	10.27	10.26

Global equity benchmark indices returns(%)				
Benchmark	1 Day	1 Week	1 Month	1 Year
FTSE 100	-3.49	-8.61	-8.30	-4.37
Hang Seng	0.31	-3.00	-4.19	-6.88
Nikkei 225	-2.13	-6.52	-5.98	1.82
S&P 500	-4.42	-11.69	-8.17	6.67
Shanghai Composite	0.11	-1.39	--	1.15

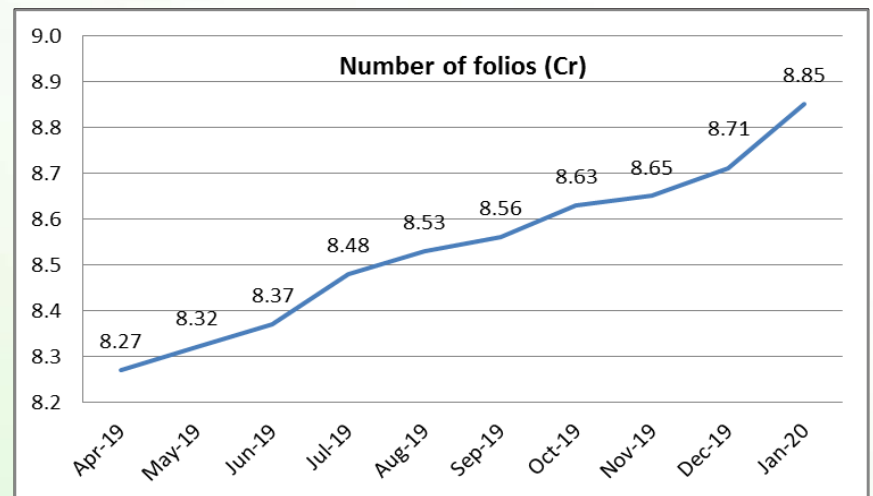
Mutual Fund Roundup

- ❖ Sebi wants MFs to be agile in stress events, warns industry on mis-selling
- ❖ Sebi urges mutual funds to create liquidity buffer for debt schemes
- ❖ Relief for Nippon India MF as SAT sets aside Irdai order in pledging case
- ❖ Sebi allows investors to access stock exchange platform to transact in MFs

Mutual fund inflows



Mutual fund folio growth



(Data source: NSE, NSDL, FIMMDA, investing.com, tradingeconomics.com, fx-rate.net, ACEMF, AMFI, RBI, equitymaster.com)

(News source: Economic Times, Business Standard)