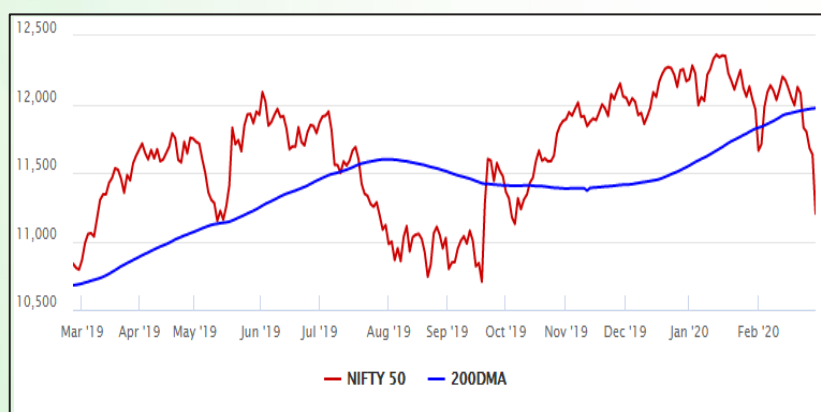


Equity Market

- ❖ Sensex logs 2nd highest fall in history, tanks 1,448 points to 38,297
- ❖ India VIX rises 28.75% to 23.24
- ❖ Nifty P/E at 25.49, Nifty Midcap 100 P/E at 25.04

S&P CNX Nifty - 200 DMA



Nifty Equity Benchmark Indices

Index	Current Value	%chg	52 wkhigh	52 wklow
Nifty 50	11201.8	-3.56	12430.5	10637.2
Nifty Mid cap 100	16786.4	-3.75	18495.9	14975.8
Nifty Small cap 100	5675.1	-3.83	6822.5	5114.6
Bank	29147.2	-3.25	32613.1	26560.6
Auto	6904.0	-3.76	9059.4	6727.6
FMCG	29310.3	-2.24	32644.9	28099.2
Pharma	7576.8	-3.68	9578.4	7047.1
Realty	280.6	-2.57	336.4	229.5

Factors driving the market

- ❖ Domestic market continues to mirror selloff in global markets
- ❖ Metal stocks the biggest loser, tanking 7.34%
- ❖ Auto stocks battered as virus hits their supply chain

Nifty Top Gainers/Losers

Index	Value	52 wkhigh	52 wklow
Top Gainers			
Indian Oil Corp	106.3	170.8	100.9
Maruti Suzuki Ind	6294.1	7758.7	5446.1
ITC	196.6	310.0	192.1
Top Losers			
Vedanta	112.9	195.1	112.1
Tata Motors	129.7	239.4	106.0
Hindalco	155.0	221.2	154.1

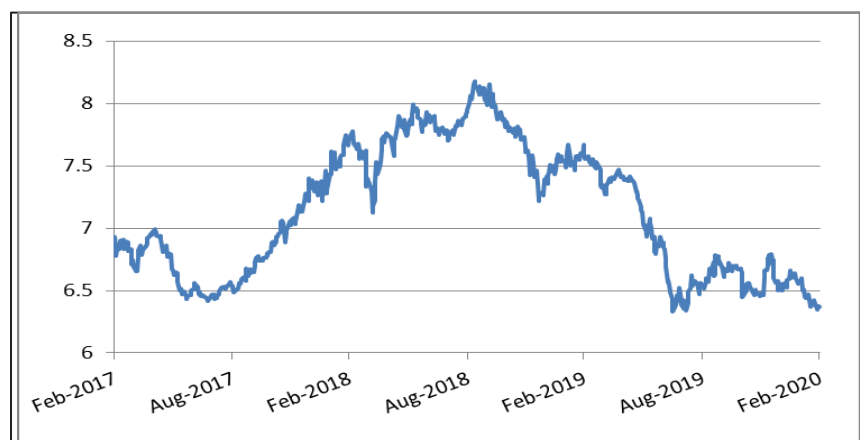
Equity FPI Inflows

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
28-Feb-20	6276.4	9341.2	(3064.9)
27-Feb-20	5824.7	8957.0	(3132.3)
26-Feb-20	5723.8	7562.0	(1838.2)
Total Feb-2020	127755.2	125935.4	1819.8
Total Jan-2020	116261.5	104139.0	12122.6
Total 2019	1437559.6	1336438.9	101120.8

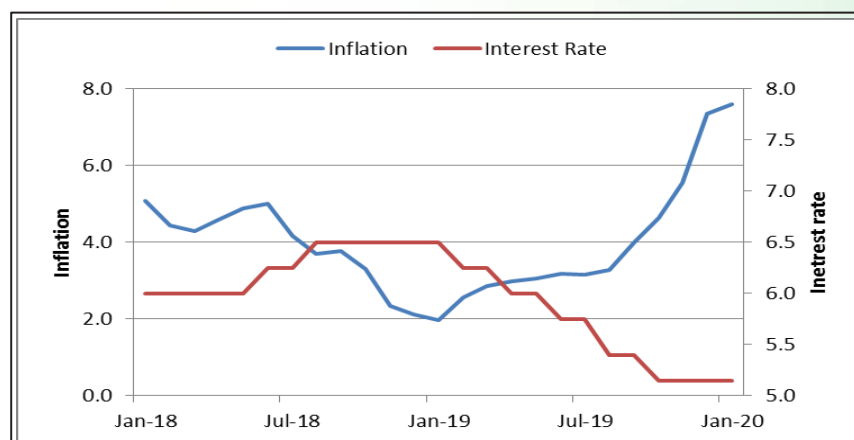
Debt Market

- ❖ RBI to conduct LTRO for 3-year tenor worth Rs 25,000 crore today
- ❖ SBI expects Q4 corporate credit growth at 5-7%
- ❖ Allahabad Bank lowers external benchmark-linked loan pricing
- ❖ CPCL raises Rs 1,145 crore through NCBs issue to meet capex funding
- ❖ RBI readies a rescue plan if Yes Bank fails to raise funds

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	6.37
1-mth CP rate	5.38
3-mth CP rate	5.45
6-mth CP rate	5.73
1 Yr CP rate	6.14
1-mth CD rate	5.17
3-mth CD rate	5.40
6-mth CD rate	5.72
1 Yr CD rate	5.75

Auctions / Money Market Operation		
Date	Description	Amount(Cr)
Mar-02	G-sec auction	--
Mar-02	Total repo (outstanding)	--
Mar-02	Total reverse repo (outstanding)	--
Mar-02	Marginal standing facility (outstanding)	--
Mar-02	GOI surplus cash balance with RBI	--

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
28-Feb-20	1267.8	3207.6	(1939.8)
27-Feb-20	863.6	3080.6	(2217.0)
26-Feb-20	698.0	758.1	(60.1)
Total Feb-2020	48106.3	46009.6	2096.8
Total Jan-2020	25926.9	37574.9	(11648.0)
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	2.13	13.76	8.31	8.71
Crisil Short Term Bond Fund Index	1.26	10.59	7.90	8.28
Crisil ST Debt Hybrid 75+25 Index	-0.89	9.23	8.15	8.01
Crisil Liquid Fund Index	0.46	6.56	6.98	7.26

Macro

- ❖ India's Q3 GDP growth at 4.7%, up from 4.5% in previous quarter
- ❖ Core sector output in January grows by 2.2% as power generation picks up
- ❖ April-January fiscal deficit reaches 128.5% of Rs 7.67 lakh crore revised FY20 target
- ❖ Government loosened purse strings with fiscal deficit in mind, willing to do more: FM
- ❖ Sovereign wealth funds looking at infrastructure sector in India

	Q3 FY2020(%)	Q2 FY2020(%)	Q3 FY2019(%)
GDP growth	4.7	4.5	6.6

Commodity Prices				
	Current	Week ago	Month ago	Year ago
Brent crude(\$/bbl)	50.52	58.24	59.51	66.03
Gold (RS/10 gms)	42,352	41,493	40,656	33,250

	Jan-2020 (%)	Dec-2019 (%)	Year ago (%) (Jan-2019)
CPI	7.59	7.35	1.97
WPI	3.10	2.59	2.76
Core Sector Output	2.20	1.30	2.10

Global market trends

- ❖ Dow, S&P suffer biggest weekly plunge since 2008 crisis on concerns over global recession
- ❖ US postpones ASEAN regional summit due to coronavirus: US official
- ❖ Saudi Arabia temporarily suspends entry of GCC citizens to Mecca and Medina
- ❖ Oil prices sink to lowest in over a year, biggest weekly drop since 2016
- ❖ Britain opens trade talks with EU, threatens to leave if no progress made

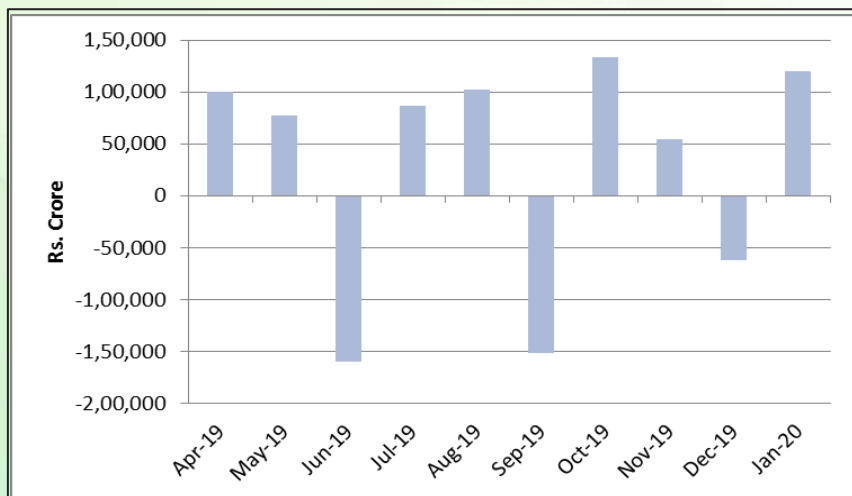
INR vs Global currency		
	Current	Prev close
USD	71.18	71.94
GBP	92.24	92.66
Euro	79.76	79.02
Yen	0.67	0.66
Yuan	10.32	10.26

Global equity benchmark indices returns(%)				
Benchmark	1 Day	1 Week	1 Month	1 Year
FTSE 100	-3.18	-11.12	-9.68	-7.40
Hang Seng	-2.42	-4.32	-0.69	-9.31
Nikkei 225	-3.67	-9.59	-8.89	-2.13
S&P 500	-0.82	-11.49	-8.41	5.37
Shanghai Composite	-3.71	-5.24	--	-3.80

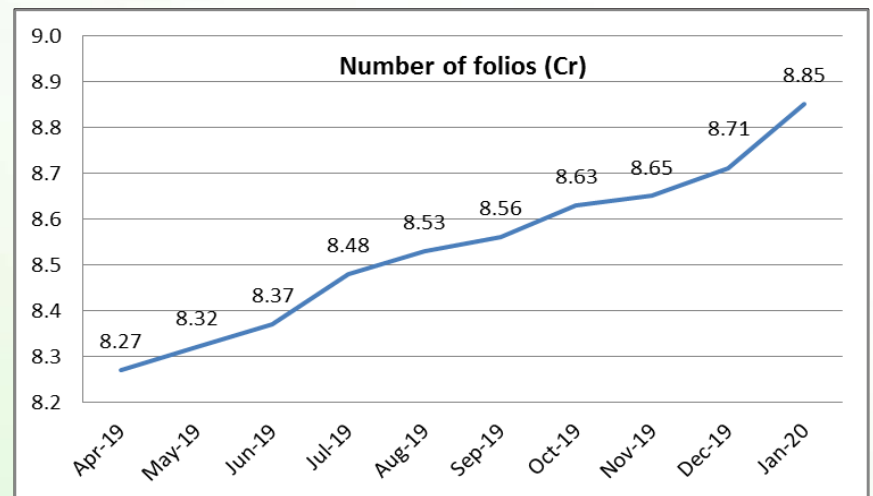
Mutual Fund Roundup

- ❖ Only KYC verified customers will be able to transact in mutual funds from today
- ❖ 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
- ❖ 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)