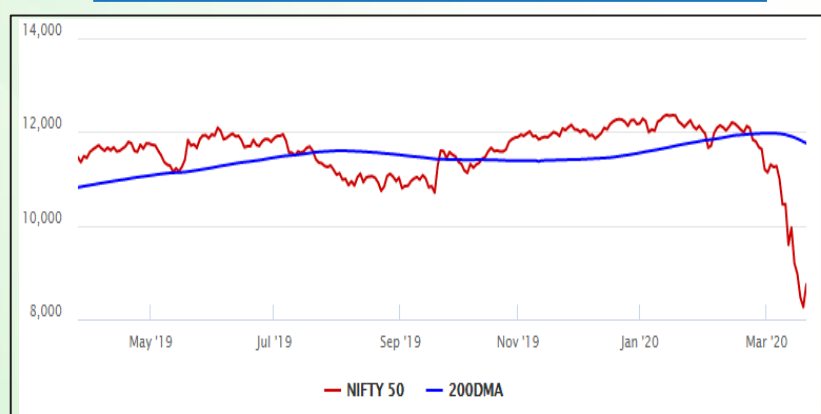


Equity Market

- ❖ Sensex halts 4-day corona carnage, rises 1,627 pts to 29,916
- ❖ India VIX drops 7.30% to 67.10
- ❖ Nifty P/E at 19.72, Nifty Midcap 100 P/E at 18.90

S&P CNX Nifty - 200 DMA



Nifty Equity Benchmark Indices

Index	Current Value	%chg	52 wkhigh	52 wklow
Nifty 50	8745.5	5.83	12430.5	7832.6
Nifty Mid cap 100	12661.3	4.79	18495.9	11597.6
Nifty Small cap 100	3885.3	2.08	6822.5	3671.1
Bank	20317.6	0.95	32613.1	18675.7
Auto	5370.2	3.71	9059.4	5042.9
FMCG	25931.6	8.77	32644.9	22699.1
Pharma	6951.9	4.07	9578.4	6242.9
Realty	196.4	2.33	336.4	182.0

Factors driving the market

- ❖ Markets rise on slew of support measures announced by policymakers around the world
- ❖ FMCG stocks gain on rising demand for essentials amid lockdown
- ❖ Oil stocks gain as oil prices rebound a bit

Nifty Top Gainers/Losers

Index	Value	52 wkhigh	52 wklow
Top Gainers			
Bharti Infratel	152.1	333.5	120.1
ONGC	71.9	178.9	50.0
GAIL	80.8	182.7	65.0
Top Losers			
HDFC Bank	881.3	1305.5	795.0
Adani Ports	255.2	430.6	232.0
IndusInd Bank	440.1	1834.4	374.8

Equity FPI Inflows

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
20-Mar-20	6761.4	11343.0	(4581.7)
19-Mar-20	6550.0	11594.6	(5044.6)
18-Mar-20	7047.9	10710.8	(3663.0)
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

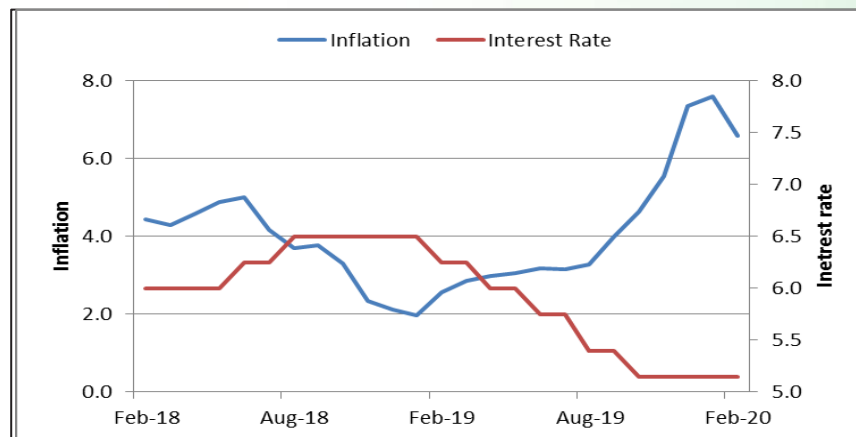
Debt Market

- ❖ DLF raises Rs 1000 crore via issue of debentures
- ❖ India Inc seeks fiscal stimulus, moratorium on debt repayment to mitigate coronavirus impact
- ❖ Future Enterprises receives revision in credit ratings from Brickwork Ratings
- ❖ Indian banks seek easier loan repayment, NPA classification due to Covid-19

10-year G-sec yield



Inflation vs. Interest rate



Debt FPI Inflows

Debt Watch	Percent
Call rate	4.62
Repo rate	5.15
10 Yr Gsec yield	6.26
1-mth CP rate	5.98
3-mth CP rate	6.47
6-mth CP rate	5.60
1 Yr CP rate	6.28
1-mth CD rate	5.55
3-mth CD rate	5.44
6-mth CD rate	6.56
1 Yr CD rate	6.68

Auctions / Money Market Operation		
Date	Description	Amount(Cr)
Mar-23	G-sec auction	--
Mar-23	Total repo (outstanding)	--
Mar-23	Total reverse repo (outstanding)	2,33,901
Mar-23	Marginal standing facility (outstanding)	612
Mar-23	GOI surplus cash balance with RBI	--

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
20-Mar-20	336.9	6141.2	(5804.3)
19-Mar-20	1399.6	4669.0	(3269.4)
18-Mar-20	722.7	8894.5	(8171.8)
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	-1.02	10.99	7.68	8.38
Crisil Short Term Bond Fund Index	-1.23	8.21	7.31	7.89
Crisil ST Debt Hybrid 75+25 Index	-8.11	0.09	5.55	6.67
Crisil Liquid Fund Index	0.29	6.32	6.91	7.20

Macro

- ❖ LIC declares relaxation on premium payments amid coronavirus spread
- ❖ India has enough stock to supply ration shops for 1 year
- ❖ Govt tells companies to protect wages, not terminate workers
- ❖ Securities transaction tax collection up 5% on higher derivatives trade
- ❖ India imposes 14-day quarantine on shipping vessels from China

	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)	27.34	34.67	59.31	68.50
Gold (RS/10 gms)	40,989	41,859	41,493	31,812

	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

- ❖ Wall Street dives most in a week since 2008; Dow Jones, S&P fall over 4%
- ❖ US Fed announces more measures to ease dollar crunch, liquidity strains
- ❖ S&P warns 1 in 10 US firms may default on debt
- ❖ China central bank official calls for stepped-up global policy coordination
- ❖ UK govt to pay 80% of wages of workers to protect jobs affected by Covid-19

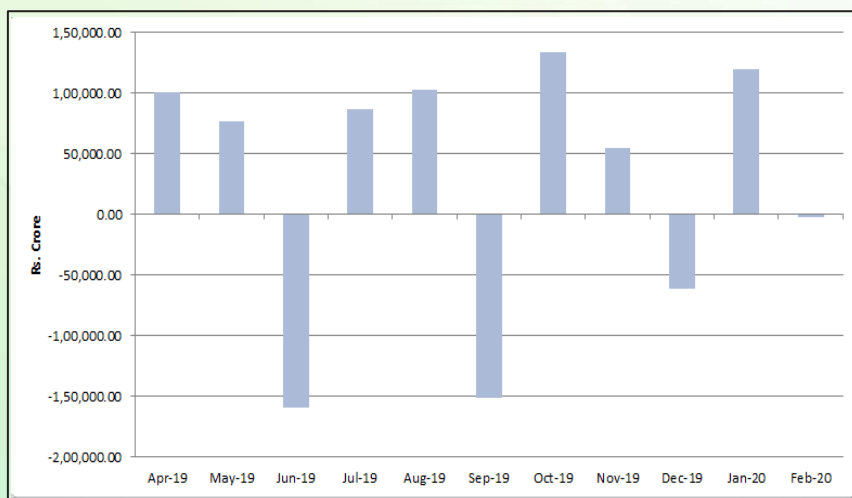
INR vs Global currency		
	Current	Prev close
USD	76.10	75.62
GBP	88.70	88.10
Euro	81.64	81.40
Yen	0.69	0.68
Yuan	10.72	10.66

Global equity benchmark indices returns(%)				
Benchmark	1 Day	1 Week	1 Month	1 Year
FTSE 100	0.76	-3.27	-29.89	-27.98
Hang Seng	5.05	-5.11	-16.49	-21.67
Nikkei 225	--	-5.04	-29.22	-23.46
S&P 500	-4.34	-14.98	-30.94	-17.70
Shanghai Composite	1.61	-4.91	-9.67	-11.55

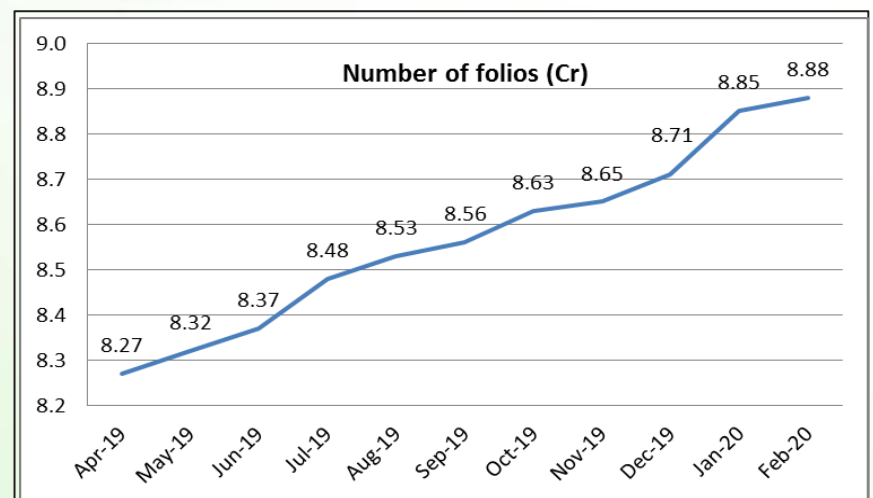
Mutual Fund Roundup

- ❖ AMFI warns of disruptions to mutual funds in Covid-19 lockdown
- ❖ Mutual funds to allow online transaction only till further notice amid lockdown
- ❖ MFs seek support from RBI as liquid funds see sharp rise in redemptions
- ❖ Liquid funds hit with outflows of Rs 43,825 crore

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)

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Mutual Fund investments are subject to market risks, read all scheme related documents carefully.