

Indices Performance

Global Indices	14-Apr	Prev_Day	Abs. Change	% Change
Russell 3000	2,077	2,098	-21	-1.00
Nasdaq	13,858	13,996	-138	-0.99
FTSE	6,940	6,890	49	0.71
Nikkei	29,621	29,752	-131	-0.44
Hang Seng	28,901	28,497	404	1.42
Indian Indices	13-Apr	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	48,544	47,883	661	1.38
Nifty 50	14,505	14,311	194	1.36
Nifty 100	14,639	14,450	189	1.31
Nifty 500	12,187	12,024	163	1.35
Nifty Bank	31,772	30,792	980	3.18
S&P BSE Power	2,399	2,360	39	1.64
S&P BSE Small Cap	20,805	20,557	248	1.21
S&P BSE HC	22,400	22,551	-151	-0.67

P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
13-Apr	33.42	0.74	32.72	0.99
Month Ago	35.36	0.71	40.94	1.06
Year Ago	18.58	1.41	20.27	1.69

Nifty 50 Top 3 Gainers

Company	13-Apr	Prev_Day	% Change
M&M	811	752	7.95
Bajaj Finserv Limited	9807	9163	7.02
Tata Motors	303	287	5.69

Nifty 50 Top 3 Losers

Company	13-Apr	Prev_Day	% Change
Dr.Reddy	4777	4997	-4.40
TCS	3104	3247	-4.39
Tech Mahindra	1002	1040	-3.65

Advance Decline Ratio

	BSE	NSE ^[1]
Advances	1923	1407
Declines	949	519
Unchanged	174	70

Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows**	-608	54393
MF Flows**	-63	-24968

*12th Apr 2021; **6th Apr 2021

Economic Indicator

YoY(%)	Current	Quarter Ago	Year Ago
CPI	5.52% (Mar-21)	4.59% (Dec-20)	5.84% (Mar-20)
IIP	-3.60% (Feb-21)	-1.60% (Nov-20)	5.20% (Feb-20)
GDP	0.40% (Dec-20)	-7.50% (Sep-20)	3.30% (Dec-19)

Since May-17, MOSPI has revised base year of IIP & WPI from 2004-05 to 2011-12, and for CPI from 2010 to 2012

[1] Data as on 13 Apr, 2021; [2] Data as on 12 Apr, 2021

Global Indices

- Asian markets largely closed in the green after the International Monetary Fund offered a more upbeat view on Asia's economic outlook than six months ago but warned that a faster-than-expected rise in U.S. interest rates may disrupt markets by triggering capital outflows from the region. Today (as on Apr 15), Asian markets were muted with Australia's jobs data for Mar 2021 expected later today. While Nikkei rose 0.30%, Hang Seng fell 0.41% (as at 8 a.m. IST).
- European markets rose with market participants reacting to corporate earnings, the latest batch of economic data from euro area, and updates on the vaccine front.
- U.S. markets rose initially on upbeat quarterly results of couple of U.S. financial giants. However, gains reversed and market ended on a weak note mostly due to weakness among technology stocks.

Indian Equity Market

- Indian equity markets closed in the green as sentiments got a boost after the government moved to fast-track approvals for foreign COVID-19 vaccines. According to media reports, government is likely to fast-track emergency approvals for shots already approved in western countries and Japan, paving the way for possible imports of the vaccines.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 1.38% and 1.36% to close at 48,544.06 and 14,504.80 respectively.
- The overall market breadth on BSE was strong with 1,923 scrips advancing and 949 scrips declining. A total of 174 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Auto was the major gainer, up 4.3% followed by S&P BSE Metal, up 3.51% and S&P BSE Finance, up 3.34%. S&P BSE IT was the major loser, down 2.63% followed by S&P BSE Teck, down 2.05% and S&P BSE Healthcare, down 0.67%.

Domestic News

- The Finance Ministry said, the provisional indirect tax collections (both GST & non-GST) for the FY21 increased 12.3% YoY to Rs. 10.71 lakh crore. The net tax collections rose 21% YoY to Rs. 1.32 lakh crore in FY21. Net indirect tax collection stood at 108.2% of the revised estimates (RE) of indirect taxes for FY21.
- The Union Agriculture Ministry has signed an agreement with Microsoft to run a pilot programme in 100 villages across six states to assist farmers in lowering input costs and increasing income. According to the agriculture minister, new technology would assist in making agriculture productive as well as attracting youth to farming.
- The government has cut the annual marking fee for a new Bureau of Indian Standards (BIS) license and certification by 50% for micro-industry, startups and women entrepreneurs. It also mentioned that BIS services are now available to all at no cost and can be downloaded from the e-BIS standardisation port. BIS a government quality standards-setting body, issues licenses with a standard mark to help identify the unit, which has manufactured the product at a specific location.
- According to the Ministry of External Affairs, India and France discussed ways to enhance bilateral cooperation in the Indo-Pacific, including through a trilateral mechanism with Australia to resolve emerging maritime and space challenges. During the talks between the two ministries, France agreed to join India's Indo-Pacific Oceans Initiative (IPOI). The two sides have agreed on the value of expediting talks on a trade and investment agreement between India and the European Union.
- Accenture has announced that it will collaborate with Bharat Petroleum Corporation Ltd. (BPCL) to develop a digital platform for the sales and distribution network of India's second largest oil and gas business.
- Pine Labs, a unicorn fintech firm, has paid over \$45 million for Fave, Southeast Asia's fastest-growing market fintech platform.

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FII Derivative Trade Statistics		13-Apr		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	6192.96	7933.41	12419.78	
Index Options	412371.39	410417.31	85764.06	
Stock Futures	17189.34	17587.33	91069.27	
Stock Options	20690.02	21265.16	15357.80	
Total	456443.71	457203.21	204610.91	

Derivative Statistics- Nifty Options			
	13-Apr	Prev_Day	Change
Put Call Ratio (OI)	0.88	1.29	-0.40
Put Call Ratio(Vol)	0.93	0.94	-0.01

Debt Watch				
	14-Apr	Wk. Ago	Mth. Ago	Year Ago
Call Rate ^[2]	3.20%	3.14%	3.22%	4.26%
T-Repo ^[2]	3.19%	3.04%	3.25%	3.20%
Repo	4.00%	4.00%	4.00%	4.40%
Reverse Repo	3.35%	3.35%	3.35%	4.00%
91 Day T-Bill ^[2]	3.33%	3.20%	3.30%	4.17%
364 Day T-Bill ^[2]	3.74%	3.71%	3.80%	4.54%
10 Year Gilt ^[2]	6.01%	6.08%	6.23%	6.50%
G-Sec Vol. (Rs.Cr) ^[2]	24707	50502	22839	10085
FBIL MIBOR ^[2]	3.44%	3.42%	3.44%	4.60%
3 Month CP Rate ^[2]	3.70%	3.70%	3.70%	6.50%
5 Year Corp Bond	6.32%	6.43%	6.27%	7.39%
1 Month CD Rate ^[2]	3.48%	3.39%	3.05%	4.22%
3 Month CD Rate ^[2]	3.35%	3.35%	3.37%	4.52%
1 Year CD Rate ^[2]	3.99%	3.89%	4.41%	5.74%

Currency Market			
Currency	12-Apr	Prev_Day	Change
USD/INR	74.85	74.89	-0.04
GBP/INR	102.61	102.62	-0.01
EURO/INR	89.00	89.04	-0.04
JPY/INR	0.68	0.68	0.00

Commodity Prices				
Commodity	14-Apr	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	63.10	59.72	65.55	20.10
Brent Crude(\$/bl)	65.70	60.22	69.30	18.82
Gold(\$/oz)	1736	1737	1726	1714
Gold(Rs./10 gm)	46391	45829	44177	40989

Source: Refinitiv

[1] Data as on 13 Apr, 2021; [2] Data as on 12 Apr, 2021

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Derivatives Market

- Nifty Apr 2021 Futures stood at 14,541.15, a premium of 36.35 points above the spot closing of 14,504.80. The turnover on NSE's Futures and Options segment rose to Rs. 42,92,923.97 crore on April 13, 2021, compared with Rs. 35,35,508.06 crore on April 12, 2021.
- The Put-Call ratio stood at 0.82 compared with the previous session's close of 0.87.
- The Nifty Put-Call ratio stood at 1.15 compared with the previous session's close of 0.88.
- Open interest on Nifty Futures stood at 12.1 million, compared with the previous session's close of 12.39 million.

Indian Debt Market

- Fixed income market is closed on occasion of Dr. Baba Saheb Ambedkar Jayanti.

Currency Market Update

- Currency market is closed on occasion of Dr. Baba Saheb Ambedkar Jayanti.
- Euro rose against the U.S. dollar as U.S. Treasury yields held below recent highs, reducing the relative attractiveness of the greenback.

Commodity Market Update

- Gold prices fell as higher U.S. Treasury yields dampened the safe haven appeal of the yellow metal.
- Brent crude prices surged after U.S. crude inventories fell by 5.9 million barrels in the week ended Apr 9, 2021.

International News

- According to the Labor Department, U.S. consumer price index (CPI) 0.6% in Mar 2021, the largest gain since August 2012, after rising 0.4% in Feb 2021. The core CPI increased 1.6% YoY in Mar after rising 1.3% in Feb.
- According to Office for National Statistics, U.K. gross domestic product (GDP) rose 0.4% MoM in Feb 2021 following a revised 2.2% decline in Jan 2021. Despite the coronavirus lockout constraints, the UK economy recovered in February.
- According to data from customs office, China's exports rose 30.6% YoY in Mar 2021 as against 60.6% rise in Feb 2021. Meanwhile, imports rose 38.1% YoY in Mar as against 22.2% rise in Feb. Consequently, the trade surplus fell to \$13.8 billion in Mar.

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