

Indices Performance

Global Indices	05-Mar	Prev_Day	Abs. Change	% Change
Russell 3000	1,909	1,880	29	1.52
Nasdaq	12,920	12,723	197	1.55
FTSE	6,631	6,651	-20	-0.31
Nikkei	28,864	28,930	-66	-0.23
Hang Seng	29,098	29,237	-139	-0.47
Indian Indices	05-Mar	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	50,405	50,846	-441	-0.87
Nifty 50	14,938	15,081	-143	-0.95
Nifty 100	15,084	15,239	-154	-1.01
Nifty 500	12,539	12,689	-150	-1.18
Nifty Bank	35,228	35,803	-574	-1.60
S&P BSE Power	2,516	2,562	-46	-1.80
S&P BSE Small Cap	20,936	21,254	-318	-1.50
S&P BSE HC	21,205	21,520	-315	-1.46

P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
5-Mar	35.12	0.71	40.76	1.06
Month Ago	34.26	0.79	41.46	1.06
Year Ago	23.17	1.15	25.65	1.35

Nifty 50 Top 3 Gainers

Company	05-Mar	Prev_Day	% Change
ONGC	115	113	2.00
GAIL	147	144	1.87
Maruti	7249	7132	1.65

Nifty 50 Top 3 Losers

Company	05-Mar	Prev_Day	% Change
Indusind Bank	1040	1092	-4.77
Tata Motors	325	339	-4.14
Wipro	421	439	-4.09

Advance Decline Ratio

	BSE	NSE
Advances	1010	537
Declines	1975	1423
Unchanged	144	76

Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	1358	44378
MF Flows**	-260	-29104

*5th Mar 2021; **2nd Mar 2021

Economic Indicator

YoY(%)	Current	Quarter Ago	Year Ago
CPI	4.06% (Jan-21)	7.61% (Oct-20)	7.59% (Jan-20)
IIP	1.00% (Dec-20)	1.00% (Sep-20)	0.40% (Dec-19)
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

Global Indices

- Asian markets slipped as U.S. Treasury yields spiked in reaction to the latest comments from Federal Reserve Chair indicating that he expects some inflationary pressures in the time ahead. Today (as on Mar 8), markets are trading higher with investors taking positive cues from upbeat U.S. jobs report which fuelled hopes for a faster economic recovery. Both Nikkei and Hang Seng are up 0.97% and 0.91% (as at 8:00 AM IST), respectively.
- European markets fell, weighed down by rising U.S. bond yields and concerns over inflation.
- U.S. markets went up after the Treasury yield, which spiked early in the session, saw pullback later inspiring traders to pick up stocks at relatively reduced levels.

Indian Equity Market

- Indian equity markets slipped, dragged by weak global cues following recent spike in U.S. Treasury yield coupled with rise in Brent crude prices.
- Key benchmark indices S&P BSE Sensex and Nifty 50 lost 0.87% and 0.95% to close at 50,405.32 and 14,938.10 respectively.
- The overall market breadth on BSE was weak with 1,010 scrips advancing and 1,975 scrips declining. A total of 144 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Oil & Gas was the major gainer, up 0.18% followed by S&P BSE Energy, up 0.07%. S&P BSE Metal was the major loser, down 2.16% followed by S&P BSE Power, down 1.8% and S&P BSE Telecom, down 1.77%.

Domestic News

- According to the Prime Minister, India's output is projected to increase by USD 520 billion in the next five years as a result of the production linked incentive (PLI) scheme, which is aimed at boosting domestic manufacturing and exports. In addition, the government is constantly enacting reforms in order to improve domestic manufacturing. The PLI scheme was allocated around Rs 2 lakh crore in this year's Budget for the next five years, and it is expected that the scheme will result in an increase in output of about USD 520 billion over the next five years.
- According to the Food Waste Index Report 2021 by United Nations Environment Programme (UNEP) and partner organisation WRAP, 931 million tonnes of food waste were produced in 2019, with 61% coming from households, 26% from food service, and 13% from retail. The report further said that household food waste in India is about 68.7 million tonnes a year.
- The ministry of housing and urban affairs published rankings for cities with populations of more than a million people, as well as a separate ranking for cities with populations of less than a million people. Bengaluru, Pune, and Ahmedabad emerged as India's most livable cities among the million-plus cities followed by Chennai, Surat, Navi Mumbai, Coimbatore, Vadodara, Indore and Greater Mumbai. Shimla is the most liveable city on the Ease of Living Index of cities with less than 1 million population.
- According to Economic Survey by the State Assembly, during FY21, Maharashtra's economy is projected to contract by 8% and Himachal Pradesh is expected to register a negative growth of 6.2% with industry and services sectors bearing the brunt of the COVID-19 pandemic and subsequent lockdown.
- Coal India Ltd (CIL) announced that its board approved the payment of second interim dividend of Rs. 5 per share for FY21.
- Optimus Infracom has completed the sale of one of its Noida real estate properties for Rs. 285 crore, which it intends to use to expand its cell phone manufacturing business.

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FII Derivative Trade Statistics		05-Mar	
(Rs Cr)	Buy	Sell	Open Int.
Index Futures	5496.63	7761.79	14875.02
Index Options	1200064.83	1186983.77	75874.31
Stock Futures	14865.85	16353.62	103170.79
Stock Options	12530.81	12660.91	12088.09
Total	1232958.12	1223760.09	206008.21

Derivative Statistics- Nifty Options			
	05-Mar	Prev_Day	Change
Put Call Ratio (OI)	1.12	1.23	-0.12
Put Call Ratio(Vol)	1.00	1.02	-0.02

Debt Watch				
	05-Mar	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.16%	3.24%	3.26%	4.94%
T-Repo	3.23%	3.22%	3.19%	4.78%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	3.26%	3.10%	3.34%	4.80%
364 Day T-Bill	3.70%	3.64%	3.68%	5.00%
10 Year Gilt	6.23%	6.23%	6.07%	6.24%
G-Sec Vol. (Rs.Cr)	25837	26783	39920	75493
FBIL MIBOR	3.40%	3.47%	3.47%	5.15%
3 Month CP Rate	3.70%	3.50%	3.85%	5.60%
5 Year Corp Bond	6.32%	6.20%	6.63%	6.78%
1 Month CD Rate	3.08%	2.96%	3.31%	5.19%
3 Month CD Rate	3.48%	3.28%	3.36%	5.35%
1 Year CD Rate	4.36%	4.25%	4.04%	5.57%

Currency Market			
Currency	05-Mar	Prev_Day	Change
USD/INR	72.76	72.71	0.04
GBP/INR	101.01	101.48	-0.47
EURO/INR	86.99	87.69	-0.70
JPY/INR	0.67	0.68	-0.01

Commodity Prices				
Commodity	05-Mar	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	66.04	61.51	56.77	45.85
Brent Crude(\$/bl)	70.21	66.81	60.24	51.63
Gold(\$/oz)	1701	1733	1812	1670
Gold(Rs./10 gm)	44310	46425	47048	43294

Source: Refinitiv

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Derivatives Market

- Nifty Mar 2021 Futures stood at 14,953.05, a premium of 14.95 points above the spot closing of 14,938.10. The turnover on NSE's Futures and Options segment fell to Rs. 25,56,870.79 crore on March 05, 2021, compared with Rs. 95,47,788.50 crore on March 04, 2021.
- The Put-Call ratio remained unchanged compared with the previous session's close of 0.98.
- The Nifty Put-Call ratio stood at 1.12 compared with the previous session's close of 1.23.
- Open interest on Nifty Futures stood at 14.63 million, compared with the previous session's close of 14.1 million.

Indian Debt Market

- Bond yields rose after the Reserve Bank of India devolved three government securities on primary dealers at its weekly bond auction. Moreover, higher U.S. Treasury yields and global crude oil prices also negatively impacted the market.
- Yield on the 10-year benchmark paper (5.85% GS 2030) rose 2 bps to close at 6.23% from the previous close of 6.21% after moving in a range of 6.18% to 6.25%.
- RBI conducted the auction of four government securities- 3.96% GS 2022, 5.15% GS 2025, 5.85% GS 2030 and GoI FRB 2033 for a cumulative amount of Rs. 31,000 crore, which was oversubscribed with huge devolvement on primary dealers.
- According to the RBI's data released in the weekly statistical supplement, India's foreign exchange reserves rose \$0.689 billion to \$584.554 billion in the week ended Feb 26, 2021 from \$583.865 billion in the previous week.

Currency Market Update

- The Indian rupee declined against the greenback as extended gains on U.S. dollar index dampened risk sentiment in the region and a consistent rise in U.S. treasury yields.
- Euro fell and touched multi-month low against the U.S. dollar after U.S. Federal Reserve Chairman expressed no concern about a recent sell-off in bonds.

Commodity Market Update

- Gold prices rose after the U.S. Federal Reserve Chief indicated to keep its monetary policy accommodative.
- Brent crude prices rose following upbeat U.S. nonfarm payroll employment report for Feb 2021.

International News

- According to the Labor Department, U.S. non-farm payroll employment increased more than expected by 379,000 jobs in Feb 2021 after climbing by an upwardly revised 166,000 jobs in Jan 2021. The unemployment rate fell 6.2% in Feb from 6.3% in Jan.
- According to data from Destatis, Germany's factory orders expanded 1.4% MoM in Jan 2021 reversing a revised 2.2% fall in Dec 2021. On a yearly basis, factory orders growth fell 2.5% from 6.1% in the prior month.
- According to the Commerce Department, U.S. factory orders rose 2.6% in Jan 2021 after jumping by an upwardly revised 1.6% in Dec 2020. The report said orders for durable goods and non-durable goods rose 3.4% and 1.9%, respectively, in Jan 2021.

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