

Daily Dossier

May 06, 2021

Domestic Equity (% Change)

Index	1 Day	1 Week	1 Year
S&P BSE Sensex	0.88	-2.12	54.76
S&P BSE 100	0.94	-1.25	59.60
S&P BSE 200	0.95	-0.98	62.82
Nifty 50	0.84	-1.66	58.79
Nifty 100	0.95	-1.21	58.39
Nifty 200	0.96	-1.01	61.81

Returns less than 1 year are absolute and greater than 1 year are compounded annualized

Domestic Fixed Income (% Change)

Index	1 Day	1 Week	1 Year
ICRA Composite Gilt Index	39.33	16.20	5.93
ICRA Liquid Index	2.62	3.23	3.69
ICRA Composite Bond Fund Index	34.08	13.95	8.14
ICRA Composite AAA Corporate Bond Index	28.30	11.54	10.75

Returns less than 1 year are simple annualised and greater than 1 year are compounded annualized

Currency Data (RBI Reference Rate)

Index	5-May-21	28-Apr-21	5-May-20
INR / USD	73.97	74.40	75.57
INR / EUR	88.80	89.78	82.46
INR / GBP	102.77	103.26	94.22
INR / 100 Yen	67.58	68.28	70.84

[1] Data as on 04 May,

Global Equity (% Change)

Index	1 Day	1 Week	1 Year
Nasdaq Composite	-0.37	-3.34	54.19
Nikkei ^[2]	NA	-0.83	NA
FTSE	1.68	1.09	20.34
SSE Composite Index ^[2]	-0.81	-0.30	20.52
KOSPI ^[1]	0.64	-1.07	66.06
HangSeng	-0.49	-2.25	19.06

Returns less than 1 year are absolute and greater than 1 year are compounded annualized

Domestic Commodity (% Change)

Index	1 Day	1 Week	1 Year
Crude Oil (1 bbl)	0.15	1.53	212.69
Gold (10 gm)	0.00	0.00	16.05
Silver (1 kg)	0.00	0.00	89.51
Aluminium (1 kg)	-4.29	0.43	42.81

Returns are absolute

Key Economic Indicators (In %)

Index	Latest	Previous
WPI (Mar'21)	7.39	4.17
CPI (Mar'21)	5.52	5.03
IIP (Feb'21)	-3.60	-0.90
GDP (Q3 FY'21)	0.40	-7.50



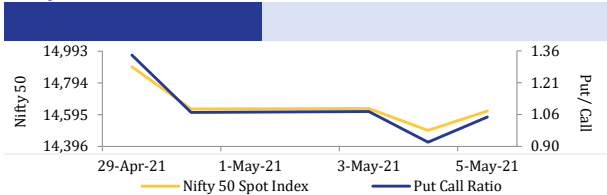
Quote of the day

"Only buy something that you'd be perfectly happy to hold if the market shut down for 10 years." - Warren Buffet (Business magnate, Investor and Philanthropist)



Equity

Nifty 50 and Put Call Ratio Movement



Advance Decline Ratio

	NSE	BSE
Advance	1,187	1,795
Decline	707	1,150
Unchanged	103	167

Institutional Flow - Equity (₹ Cr.)

	Purchase	Sales	Net
FII Flows	5,885	7,629	-1,744
MF Flows**	160	68	92
DII Flows	4,255	4,496	-241

** Data as on May 04, 2021

Institutional Flow - Debt (₹ Cr.)

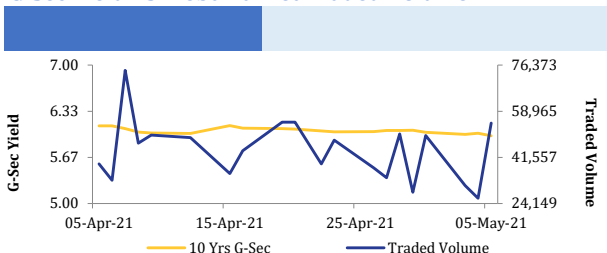
	Purchase	Sales	Net
FII Flows	913	284	629
MF Flows**	532	533	-2

- Indian equity markets managed to close in the green in response to the RBI's announcement of COVID-19 healthcare package of Rs 50,000 crore for vaccine makers, medical equipment suppliers, hospitals and patients in need of funds.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 0.88% and 0.84% to close at 48,677.55 and 14,617.85 respectively.
- The overall market breadth on BSE was strong with 1,795 scrips advancing and 1,150 scrips declining. A total of 167 scrips remained unchanged.



Debt

G-Sec Yield Vs. Debt Market Traded Volume



Liquidity Indicators (₹ Cr.)

	5-May-21	4-May-21	5-May-20
G-Sec	35,650	19,868	43,563
LAF ^[1]	-457,681	-440,115	-853,282
T-Bill	15,803	2,675	2,058
Call	12,035	11,661	13,356
T-Repo	255,379	271,076	187,798

Policy Rates (in %)

	5-May-21	28-Apr-21	5-May-20
Reverse Repo	3.35	3.35	3.75
Repo	4.00	4.00	4.40
CRR	3.50	3.50	3.00
SLR	18.00	18.00	18.00
Bank Rate	4.25	4.25	4.65

Top 5 traded G - Sec(05 May 2021)

Security	Volume (Rs. Cr.)	Closing Yield	Change in BPS
05.85 GS 2030	12,793	5.98	-3
06.64 GS 2035	5,854	6.62	-3
05.15 GS 2025	3,071	5.42	-3
06.22 GS 2035	2,296	6.59	-4
05.22 GS 2025	2,255	5.34	-4

- Bond yields fell after the Reserve Bank of India (RBI) announced some measures to support the domestic economy that got impacted due to Covid-19 pandemic.
- Yield on the 10-year benchmark paper (5.85% GS 2030) fell 3 bps to close at 5.98% as compared to the previous close of 6.01% after moving in the range of 5.96% to 6.01%.

^[1]Data as on 04 May, 2021; ^[2]Data as on 30 Apr, 2021

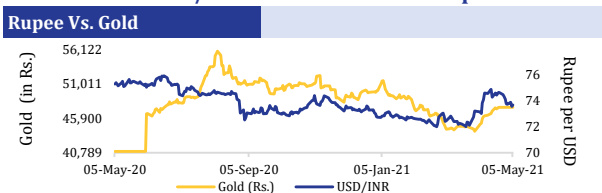


Commodity and Currency

Global Commodity

Category	Current	Prev Day	% Change
Gold (\$/oz)	1,786.44	1,778.48	0.45
Silver (\$/oz)	26.50	26.53	-0.11
NYMEX Crude(\$/bbl)	65.58	65.67	-0.14
Brent Crude(\$/bbl)	71.23	69.86	1.96
Baltic Dry Index ^[1]	3,157.00	3,053.00	3.41

Movement of USD/INR with Domestic Gold prices



- Gold prices rose following weakness in the greenback. However, gains were kept in check fell after U.S. Treasury Secretary opined that interest rates in U.S. may need to rise.
- The Indian rupee weakened after witnessing gains in the last two sessions against the U.S. dollar, as near-term forward premiums eased, which lead to unwinding of carry positions.



Mutual Fund

Equity

Category	1 Year	3 Years	5 Years
Large Cap Fund	53.81	10.04	12.75
Mid Cap Fund	76.44	10.47	15.07
Multi Cap Fund	67.34	10.96	14.16
Aggressive Hybrid Fund	46.38	9.24	11.78
Small Cap Fund	102.31	9.35	15.55

Debt

Category	1 Month	6 Months	1 Year
Liquid Fund	3.07	3.09	3.30
Ultra Short Duration Fund	3.99	3.47	4.58
Short Duration Fund	7.79	4.11	7.67
Long Duration Fund	10.06	1.36	5.09
Gilt Fund	8.87	1.61	4.66

Note:

1. Equity: Less than 1 year return are absolute and greater than 1 year returns are CAGR;
2. Debt: Less than 1 year return are simple annualised and greater than 1 year returns are CAGR;
3. Category as per MFI Explorer

- Mutual funds bought equity worth Rs. 159.91 crore as against sale of Rs. 68.39 crore as on May 4, 2021. This led to a net purchase of Rs. 91.52 crore compared with a net purchase of Rs. 15.20 crore on May 3, 2021.
- Mutual funds bought debt worth Rs. 531.94 crore as against sale of Rs. 533.49 crore as on May 4, 2021. This led to a net sale of Rs. 1.55 crore compared with a net purchase of Rs. 400.21 crore on May 3, 2021.



Event Calendar

Events for May 2021

Event	Date	Event	Date
Forex Reserves	7-May-21	CPI Inflation (Apr 2021)	12-May-21
Credit Growth	7-May-21	WPI Inflation (Apr 2021)	14-May-21
Deposit Growth	7-May-21	Infrastructure Output	31-May-21
Index of Industrial Production (Mar 2021)	12-May-21	Fiscal deficit (as a % of budget estimates)	31-May-21

Note: All the data of the newsletter are sourced from MFI Explorer, BSE, CCIL, MCX, NSDL, NSE, RBI, SEBI, Refinitiv

[1] Data as on 04 May, 2021; [2] Data as on 30 Apr, 2021

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