



01 Feb.2020

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|---------|
| CNX NIFTY | 11,962 | (0.6) % | 2.5 % |
| BSE SENSEX | 40,723 | (0.5) % | 4.8 % |
| CNX BANK | 30,834 | 0.6 % | 1.7 % |
| CNX MIDCAP | 18,010 | (0.7) % | (1.8) % |
| CNX SMALLCAP | 6,226 | (0.0) % | (7.6) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| DOW JONES | 28,256 | (2.1) % | (1.0) % |
| S&P 500 | 3,226 | (1.8) % | (0.2) % |
| FTSE 100 | 7,286 | (1.3) % | (4.2) % |
| HANG SENG | 26,313 | (0.5) % | (7.8) % |
| NIKKEI | 23,205 | 1.0 % | 0.0 % |
| SHANGHAI COMPOSITE | 2,977 | (2.8) % | (3.5) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 71.46 | 0.3 % | 0.4 % |
| EUR/USD | 1.10 | 0.1 % | (1.7) % |
| GBP/USD | 1.31 | 0.2 % | (1.0) % |
| USD/JPY | 108.88 | (0.2) % | 0.2 % |
| USD/AUD | 1.49 | 0.4 % | 4.3 % |
| USD/SGD | 1.36 | 0.3 % | 1.3 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 52 | (1.1) % | (15.7) % |
| Gold(INR/10g) | 40,694 | (0.1) % | 4.4 % |
| Gold Comex(USD/oz) | 1,585 | 0.8 % | 2.8 % |
| SILVER(INR/1Kg) | 46,383 | 0.6 % | 0.7 % |
| Aluminium(USD/MT) | 1,710 | (0.8) % | (3.5) % |
| Copper(USD/MT) | 5,570 | (0.9) % | (9.7) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec India | 8.1 | 0.1 % | (0.0) % |
| 10 Y GSec US 10 | 1.5 | (0.1) % | (0.4) % |

Global Economy: The US consumer sentiment index for January was upwardly revised to 99.8 from the preliminary reading of 99.1. The index is now up from the final December reading of 99.3. Chicago business barometer tumbled to 42.9 in January from a revised 48.2 in December, with a reading below 50 indicating a contraction in regional business activity. China manufacturing sector fell into stagnation in January posting a manufacturing PMI score of 50.0, the latest survey from the National Bureau of Statistics said on Friday. That's down from 50.2 in December. The bureau also said its non-manufacturing index came in with a score of 54.1, up from 53.5 in the previous month. The bureau's composite index now sits at 53.0, down from 53.4 a month earlier. The European Union's statistics office Eurostat said gross domestic product in the 19 countries rose just 0.1% quarter-on-quarter for a 1.0% year-on-year gain. Eurostat said consumer prices fell 1.0% month-on-month in January for a 1.4% year-on-year rise, accelerating from a 1.3% rate in December and 1.0% in November. Germany's retail sales decreased 3.3% on month in December, reversing a 1.6% rise in November, data from Destatis revealed on Friday. On a yearly basis, retail turnover growth eased to 0.8% from 2.7%. Japan industrial output advanced a seasonally adjusted 1.3% on month in December, the Ministry of Economy, Trade and Industry said in Friday's preliminary reading, following the 1% decline in November. On a yearly basis, industrial production was down 3%, following the 8.2% slide in the previous month. Japan retail sales were up a seasonally adjusted 0.2% on month in December, the Ministry of Economy, Trade and Industry said on Friday, following the 4.5% jump in November.

Global Equities: US stocks saw heavy losses as the UK reported its first cases of coronavirus. The DOW tanked 2% on the day, testing its lowest closing level in a month.

Indian Economy: Economic Survey 2019-20 tabled by Finance Minister Nirmala Sitharaman estimates Financial Year 2020-21 GDP growth at 6-6.5% while FY20 GDP growth is seen at 5%. Survey asked the government to deliver expeditiously on reforms. To spur economic growth and achieve \$5 trillion economy, India needs to spend about \$1.4 trillion on the infrastructure sector during FY2020-2025, the survey said. Economic Survey 2019-20, observes that the Indian economy remains on the path of fiscal consolidation and fiscal prudence amidst weak global growth. Major structural reforms have been undertaken to revive growth in and spur investment. The Economic Survey states that "The Medium Term Fiscal Policy (MTFP) presented with the Budget 2019-20, pegged the fiscal deficit target for 2019-20 at 3.3% of Gross Domestic Product (GDP), which was further expected to follow a gradual path of reduction and attain the targeted level of 3% of GDP in 2020-21. The Survey said industrial growth in 2019-20 is estimated at 2.5%. The survey said that Apr-Nov indirect tax collections have been muted. FY21 is expected to pose challenges on fiscal front. The Government may need to relax fiscal gap aim in FY20 to revive growth. Outlook on global growth continues to be weak, it added.

Equity Markets: Key benchmark indices ended the volatile session lower on Friday, with the Nifty slipping below the 12,000 mark. The barometer BSE S&P Sensex fell 190.33 points or 0.47% to 40,723.49. The Nifty 50 index fell 73.70 points or 0.61% to 11,962.10.

Corporate News: Hindustan Unilever reported a 12.95% jump in consolidated net profit to Rs 1631 crore in Q3 December 2019 over Q3 December 2018, supported by improvement in margins and volume growth. The company reported that domestic consumer growth was at 4% with underlying volume growth at 5%. Margin expansion was driven by the company's saving agenda and leverage in other expenses. ITC reported 29.13% rise in consolidated net profit to Rs 3,975.54 crore on 6.01% rise in total income to Rs 13,960.50 crore in Q3 December 2019 over Q3 December 2018. Revenue growth was driven mainly by Hotels, Agri Business and FMCG-Others (excluding the Lifestyle Retailing Business). Power Grid Corporation of India reported 13.90% rise in consolidated net profit to Rs 2672.03 crore in Q3 December 2019 as compared to Rs 2345.97 crore reported in the same period last year. Revenues rose 7.20%



to Rs 9364.36 crore in Q3 December 2019 from Rs 8735.75 crore in Q3 December 2018.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 87.6 | 90.3 | 45.8 |
| MF(INR cr) | 755.3 | 72.7 | 256.2 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 45,428 | 35,777 | 37,157 |
| F&O(INR cr) | 701,181 | 1,675,243 | 1,387,457 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 18.8 | 13.9 | 14.9 |
| NSE VIX | 17.4 | 14.9 | 16.4 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 30,834 | 0.6 % | 1.7 % | Energy | 14,839 | (2.7) % | (10.2) % |
| IT | 16,144 | (1.1) % | 1.9 % | Pharma | 8,139 | (1.2) % | (13.2) % |
| Metals | 2,569 | (2.3) % | (17.2) % | Finance | 14,317 | 0.2 % | 14.5 % |
| Auto | 8,087 | (1.2) % | (3.9) % | PSU | 2,366 | 0.8 % | (30.1) % |
| FMCG | 30,775 | (0.5) % | 1.9 % | Real Estate | 331 | 1.2 % | 23.9 % |

NSE MOVERS AND SHAKERS

| <i>TOP GAINERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | <i>TOP LOSERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Avenue Sup | 2,134 | 4.0 % | 42.9 % | Marico | 315 | (6.6) % | (9.4) % |
| Kotak Mah. | 1,692 | 3.9 % | 26.3 % | O N G C | 109 | (5.8) % | (30.7) % |
| Dabur Indi | 496 | 3.6 % | 23.6 % | Tata Motor | 177 | (5.2) % | (5.7) % |
| Bandhan Ba | 450 | 2.9 % | (15.0) % | Colgate-Pa | 1,329 | (4.8) % | 5.6 % |
| Oracle Fin | 2,941 | 2.7 % | (13.3) % | Tata Motor | 74 | (4.2) % | (19.5) % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| No Data Found | | | | | |

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