



01 Feb.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	13,635	(1.3) %	65.2 %
BSE SENSEX	46,286	(1.3) %	63.8 %
CNX BANK	30,566	0.7 %	67.9 %
CNX MIDCAP	20,910	(0.4) %	82.3 %
CNX SMALLCAP	7,177	(0.6) %	102.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,983	(2.0) %	(2.0) %
S&P 500	3,714	(1.9) %	(1.1) %
FTSE 100	6,407	(1.8) %	(2.5) %
HANG SENG	28,284	(0.9) %	3.0 %
NIKKEI	27,663	(1.9) %	1.5 %
SHANGHAI COMPOSITE	3,483	(0.6) %	(0.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.03	0.1 %	0.1 %
EUR/USD	1.21	(0.1) %	(1.3) %
GBP/USD	1.37	(0.2) %	0.3 %
USD/JPY	104.30	0.4 %	1.1 %
USD/AUD	1.31	0.8 %	0.8 %
USD/SGD	1.33	0.3 %	0.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(0.3) %	9.6 %
Gold(INR/10g)	49,205	0.8 %	(3.5) %
Gold Comex(USD/oz)	1,846	0.1 %	(5.3) %
SILVER(INR/1Kg)	69,944	6.3 %	1.6 %
Aluminium(USD/MT)	1,987	0.4 %	(1.3) %
Copper(USD/MT)	7,877	1.3 %	(0.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.1	0.0 %	0.2 %

Global Economy: Consumer sentiment in the US decreased by slightly more than initially estimated in the month of January, according to revised data released by the University of Michigan on Friday. The report said the consumer sentiment index for January was downwardly revised to 79.0 from the preliminary reading of 79.2. The US National Association of Realtors or NAR said its pending home sales index slipped by 0.3% to 125.5 in December after tumbling by 2.5% to 125.9 in November. MNI Indicators said its Chicago business barometer jumped to 63.8 in January from a downwardly revised 58.7 in December, with a reading above 50 indicating growth in regional business activity. The US personal income climbed by 0.6% in December after tumbling by a downwardly revised 1.3% in November. The German economy managed to expand in the fourth quarter avoiding a double-dip recession, despite the second wave of coronavirus triggered another lockdown at the end of 2020. Gross domestic product grew 0.1% sequentially in the fourth quarter, slower than the 8.5% expansion posted in the third quarter, data published by Destatis revealed on Friday. Japan industrial production dropped a seasonally adjusted 1.6% on month in December, the Ministry of Economy, Trade and Industry said on Friday, following the 0.5% fall in November. On a yearly basis, industrial production sank 3.2% after the 3.9% drop in the previous month. Upon the release of the data, the METI maintained its assessment of industrial production, saying that it is picking up.

Global Equities: The global stocks fell sharply on Friday amid a continued spell of risk aversion and rising volatility. US stocks tanked with major indices losing around 3%. Broad worries on Covid-19 front stayed in place as US citizens are now required to wear masks in public transport, including planes and trains, according to the new order by the US Centers for Disease Control (CDC).

Indian Economy: Union Minister for Finance and Corporate Affairs, Nirmala Sitharaman presented the Economic Survey 2020-21 in the Parliament today. The Economic Survey 2020-21 is dedicated to the COVID Warriors and noted that India focused on saving lives and livelihoods by its willingness to take short-term pain for long-term gain, at the onset of the COVID-19 pandemic. As per the advance estimates by NSO, India's GDP is estimated to grow by (-) 7.7% in FY21 - a robust sequential growth of 23.9% in H2: FY21 over H1: FY21. India's real GDP to record an 11.0% growth in FY2021-22 and nominal GDP to grow by 15.4% - the highest since independence. The rebound to be led by low base and continued normalization in economic activities as the rollout of COVID-19 vaccines gathers traction. On supply side, Gross Value Added (GVA) growth pegged at -7.2% in FY21 as against 3.9% in FY20. The GST collections for January touched an all-time high of about Rs 1.20 lakh crore, the finance ministry said on Sunday.

Equity Markets: Domestic equity benchmarks extended losses for the sixth straight session on Friday. Both barometer indices fluctuated between gains and losses in a highly volatile session. Investors were also cautious ahead of the Union Budget on Monday.

Corporate News: The healthcare sector is likely to get by far the maximum attention of the government in the Finance Minister, Mrs Nirmala Sitharaman's Budget for 2021-22, an ASSOCHAM-Primus Partners' survey has noted. Power demand touched an all-time high of 189.64 GW on Saturday, Power Secretary S N Sahai has said. All India demand: 1,89,644 MW (189.64 GW) at 10.39 hrs on January 30th crossed the previous highest all India demand of 1,88,452 MW (188.45 GW) on 28th January. L&T Finance Holdings Limited said that its Rs. 2,998.61 Crore Rights Issue is set to Open on February 1, 2021.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(517.5)	135.5	159.6
MF(INR cr)	(875.3)	(925.0)	(541.8)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	88,791	74,499	60,051
F&O(INR cr)	1,793,726	3,595,657	2,232,582

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	33.1	25.0	28.7
NSE VIX	25.3	22.4	26.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,566	0.7 %	67.9 %	Energy	16,159	(1.8) %	50.0 %
IT	24,646	(2.6) %	104.6 %	Pharma	12,170	(1.8) %	73.2 %
Metals	3,077	(1.9) %	98.1 %	Finance	14,593	(0.1) %	63.2 %
Auto	9,813	(2.9) %	110.7 %	PSU	1,814	1.7 %	41.4 %
FMCG	33,121	(1.5) %	25.7 %	Real Estate	306	0.5 %	77.6 %

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>
IndusInd B	846	5.4 %	147.2 %	Havells In	1,045	(11.6) %	115.6 %
Hindustan	275	4.3 %	71.2 %	Dr Reddy's	4,603	(5.5) %	48.7 %
Sun Pharma	586	3.9 %	70.6 %	Avenue Sup	2,652	(5.1) %	27.3 %
Colgate-Pa	1,603	2.5 %	29.0 %	Maruti Suz	7,207	(5.0) %	69.7 %
Punjab Nat	33	2.5 %	9.5 %	Piramal En	1,311	(4.5) %	40.0 %

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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