



02 Feb.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,281	0.0 %	73.0 %
BSE SENSEX	48,601	5.0 %	71.9 %
CNX BANK	33,089	0.0 %	81.7 %
CNX MIDCAP	21,601	0.0 %	88.3 %
CNX SMALLCAP	7,321	0.0 %	106.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,212	0.8 %	(1.3) %
S&P 500	3,774	1.6 %	0.5 %
FTSE 100	6,466	0.9 %	(1.6) %
HANG SENG	28,893	2.2 %	5.2 %
NIKKEI	28,091	1.6 %	3.1 %
SHANGHAI COMPOSITE	3,505	0.6 %	0.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.88	(0.1) %	(0.1) %
EUR/USD	1.21	0.1 %	(1.1) %
GBP/USD	1.37	(0.1) %	0.4 %
USD/JPY	104.76	0.8 %	1.5 %
USD/AUD	1.31	0.9 %	0.9 %
USD/SGD	1.33	0.2 %	0.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	2.6 %	12.5 %
Gold(INR/10g)	48,724	(1.0) %	(4.5) %
Gold Comex(USD/oz)	1,866	1.1 %	(4.3) %
SILVER(INR/1Kg)	72,915	4.2 %	5.9 %
Aluminium(USD/MT)	1,986	0.3 %	(1.4) %
Copper(USD/MT)	7,827	(0.6) %	(1.2) %

FIXED INCOME

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

Global Economy: The ISM said US manufacturing Purchasing Managers' Index or PMI declined to 58.7 in January from a downwardly revised 60.5 in December. The US Commerce Department said construction spending jumped by 1% to an annual rate of \$1.490 trillion in December after surging up by 1.1% to a rate of \$1.476 billion in November. China manufacturing sector continued to expand in January, with a seasonally adjusted PMI score of 51.5, the latest survey from Caixin showed on Monday. That's down from 53.0, although it remains above the boom-or-bust line of 50 that separates expansion from contraction. Chinese goods producers signaled a sustained rise in output during January, to extend the current period of expansion to 11 months. Euro zone manufacturing growth remained resilient at the start of the year. IHS Markit's final Manufacturing PMI fell to 54.8 in January from December's 55.2 amid renewed lockdown measures across the continent. However, that was a tad above the initial 54.7 "flash" estimate. The UK manufacturing sector activity improved in January, with the final PMI rising to 54.1 as against 52.9 in the first estimate. Japan's factory activity slipped back into contraction in January. Manufacturers reported a renewed fall in output volumes. The final Jibun Bank Japan Manufacturing PMI fell to a seasonally adjusted 49.8 in January from the prior month's stable 50.0 reading.

Global Equities: US stocks saw firm moves amid bargain buying after latest spree of losses. European markets rose on supportive manufacturing outlook.

Indian Economy: Presenting the first ever digital Union Budget, Union Minister of Finance and Corporate Affairs Nirmala Sitharaman stated that India's fight against COVID-19 continues into 2021. Provision has been made of Rs 35,000 crore for COVID-19 vaccine in Budget Estimate (BE) 2021-22. The government has committed nearly 1.97 lakh crore, over five years starting financial year 2021-22. Capital expenditure is steeply increased to provide 5.54 lakh crore which is 34.5% more than the budget estimate of 2020-21. Over and above this expenditure, more than 2 lakh crore is to be provided to states and autonomous bodies for their capital expenditure. The fiscal deficit in Revised Estimate (RE) 2020-21 is pegged at 9.5% of GDP. It has been funded through government borrowings, multilateral borrowings, small saving funds and short term borrowings. Finance Minister Nirmala Sitharaman proposed today in her Budget speech that the government will launch national monetisation for potential brownfield infrastructure assets. Highway infra work proposed include building 8,500-km of highways by March 2022, she noted.

Equity Markets: Benchmark indices ended with massive gains on Monday as investors cheered Union Budget proposals. The Nifty managed to close near 14,300 mark. Barring the Nifty Pharma index, all the sectoral indices on the NSE ended in the green.

Corporate News: Banking stocks could continue to stay in focus after a massive spurt in last session as the Budget hangover lingers around. PVR has set the issue price for QIP at Rs 1,440 per share and raised Rs 800 crore. Castrol India has reported profit at Rs 582.9 crore in Q3FY21 against Rs 187.7 crore in Q3FY20 while revenue increased to Rs 2,997 crore from Rs 935.2 crore YoY. Coal India said its Coal production in January 2021 was at 60.5 million tonnes against 63.1 million tonnes in January 2020 while offtake fell to 53.3 million tonnes from 55.9 million tonnes in the same period.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(595.5)	98.9	155.9
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)	92,783	92,783	60,209
F&O(INR cr)	3,853,697	3,853,697	2,240,339

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	30.2	30.2	28.7
NSE VIX	23.3	23.3	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	33,089	8.3 %	81.7 %	Energy	16,588	2.7 %	54.0 %
IT	24,923	1.1 %	106.9 %	Pharma	12,104	(0.5) %	72.3 %
Metals	3,227	4.9 %	107.7 %	Finance	15,702	7.6 %	75.6 %
Auto	10,228	4.2 %	119.6 %	PSU	1,956	7.8 %	52.5 %
FMCG	33,690	1.7 %	27.8 %	Real Estate	325	6.3 %	88.8 %

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	971	14.7 %	183.6 %	UPL	534	(4.7) %	74.7 %
ICICI Bank	604	12.4 %	94.1 %	Dr Reddy's	4,428	(3.8) %	43.1 %
Bajaj Fins	9,722	11.5 %	115.9 %	Torrent Ph	2,534	(2.8) %	29.4 %
DLF	282	10.3 %	112.5 %	Cipla	806	(2.4) %	94.9 %
St Bk of I	311	10.1 %	66.6 %	Alkem Lab	2,944	(2.1) %	29.7 %

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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