



03 Jan.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,282	0.0 %	5.3 %
BSE SENSEX	41,627	0.8 %	7.2 %
CNX BANK	32,444	0.0 %	7.0 %
CNX MIDCAP	17,391	0.0 %	(5.1) %
CNX SMALLCAP	5,963	0.0 %	(11.5) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,869	1.2 %	1.2 %
S&P 500	3,258	0.8 %	0.8 %
FTSE 100	7,604	0.8 %	0.0 %
HANG SENG	28,544	1.3 %	0.0 %
NIKKEI	23,657	(0.8) %	20.9 %
SHANGHAI COMPOSITE	3,085	1.2 %	0.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.09	(0.2) %	(0.2) %
EUR/USD	1.12	(0.1) %	(0.1) %
GBP/USD	1.33	0.6 %	0.6 %
USD/JPY	108.67	0.0 %	0.0 %
USD/AUD	1.43	(0.0) %	(0.0) %
USD/SGD	1.35	0.0 %	0.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	(1.0) %	31.2 %
Gold(INR/10g)	39,068	0.2 %	0.2 %
Gold Comex(USD/oz)	1,543	2.0 %	0.0 %
SILVER(INR/1Kg)	46,257	0.4 %	0.4 %
Aluminium(USD/MT)	1,772	(1.6) %	0.0 %
Copper(USD/MT)	6,165	0.1 %	0.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.9	(0.0) %	(0.0) %

Global Economy: The seasonally adjusted IHS Markit final US Manufacturing Purchasing Managers' Index (PMI) posted 52.4 in December, down slightly from 52.6 in November and the flash figure (52.5). China's manufacturing PMI fell moderately to 51.5 in December from 51.8 in November, survey results from IHS Markit showed on Thursday. Nonetheless, a score above 50 indicates expansion in the sector. Although conditions strengthened in each of the past five months, the PMI reading was the lowest seen since September, the survey revealed. People's Bank of China reduced its reserve requirement ratio, or RRR, by 50 basis points, with effect from January 6. The RRR cut will release CNY 800 billion liquidity into the financial system. The bank had also cut RRR three times last year. Euro area manufacturing PMI fell to 46.3 in December from 46.9 in November, final data from IHS Markit showed Thursday. Germany's headline IHS Markit/BME manufacturing PMI fell to 43.7 in December from a five-month high of 44.1 in November, reflecting marked decreases in output and employment. The latest reading was below the average since the current period of contraction began last January. UK manufacturing sector shrank in December as output contracted at the fastest pace since July 2012, survey data from IHS Markit showed Thursday. The Markit/Chartered Institute of Procurement & Supply PMI fell to 47.5 in December. Australia's manufacturing activity contracted the most since the survey began in May 2016. The Commonwealth Bank manufacturing PMI fell to 49.2 in December from 49.9 in November.

Global Equities: US stocks extended the substantial upward move seen last year. With the continued advance, the major averages reached new record closing highs

Indian Economy: India's manufacturing Purchasing Managers' Index, or PMI, increased to 52.7 in December from 51.2 in November, survey results from IHS Markit showed on Thursday. Among the five sub-components, four were increased in December and suppliers' delivery times remained unchanged from the preceding survey period. At the sub-sector level, consumer goods and intermediate goods grew in December. Markit noted that India's capital goods output remained in contraction. New work increased solidly in December with the pace of expansion rising at the fastest pace since July. New export orders grew for the twenty-sixth straight month, though moderately. Foreign direct investment (FDI) into India rose 15% to \$26 billion during the first half of FY2020, according to latest data. Inflow of foreign direct investment (FDI) during April-September of 2018-19 stood at \$22.66 billion. Domestic Power supply fell to 101.92 billion units in December, down 1.1% from 103.04 billion units last year, an analysis of daily load despatch data by state-run Power System Operation Corp Ltd showed.

Equity Markets: Key market barometers extended Wednesday's gains and ended near the day's high on Thursday. The Nifty ended above 12,250 mark. Good manufacturing PMI data for December lifted investors' sentiment. The barometer index, the BSE Sensex, rose 331.85 points or 0.80% to 41,637.87, as per the provisional closing data. The Nifty 50 index rose 100.45 points or 0.82% to 12,282.95, as per the provisional closing data.

Corporate News: Hero MotoCorp said it sold 424,845 units of two-wheelers in December 2019, as compared to 453,985 units in the corresponding month of the previous year (December 2018), a decline of 6.42%. In the first three quarters of the Financial Year 2020 the company sold 50,75,208 units of motorcycle and scooters compared to 60,39,585 units. Housing Development Finance Corporation (HDFC) said that it has recorded a fair value gain of Rs 9,020 crore from Gruh Finance and Bandhan Bank merger. Income from dividend was at Rs 4 crore in December 2019 quarter compared to Rs 4 crore in December 2018 quarter. During the quarter, HFDC assigned loans amounting to Rs 4,258 crore compared to Rs 6.959 crore in December 2018 quarter. JSW Energy said the company entered into an agreement with Jaiprakash Power Ventures (JPVL) to re-structure the principal outstanding amount of Rs 751.77 crore, owed by JPVL to the company.





FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	50.3	50.3	40.3
MF(INR cr)	256.3	256.3	278.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,085	27,522	37,225
F&O(INR cr)	2,898,850	2,011,472	1,358,424

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.5	12.5	15.0
NSE VIX	11.5	11.5	16.5

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	32,444	1.1 %	7.0 %	Energy	16,129	0.9 %	(2.4) %
IT	15,710	(0.1) %	(0.8) %	Pharma	8,054	0.1 %	(14.1) %
Metals	2,870	2.6 %	(7.5) %	Finance	14,698	0.8 %	17.6 %
Auto	8,267	0.7 %	(1.7) %	PSU	2,577	2.0 %	(23.9) %
FMCG	30,266	0.1 %	0.2 %	Real Estate	301	1.1 %	12.6 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
General In	245	7.8 %	(0.5) %	Marico	337	(2.5) %	(3.1) %
New India	145	7.6 %	(23.1) %	Eicher Mot	21,601	(2.2) %	7.7 %
Tata Motor	80	5.2 %	(13.6) %	ICICI Lomb	1,361	(1.8) %	34.0 %
Tata Motor	194	5.0 %	3.4 %	Berger Pai	512	(1.1) %	55.0 %
Shree Ceme	21,232	4.5 %	13.0 %	Godrej Con	684	(1.1) %	1.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
PMI Manufacturing (DEC)	03-01-2020	14:00	CHF	-	48.8
German Unemployment Change (000's) (DEC)	03-01-2020	14:25	EUR	-	-
Euro-Zone M3 Money Supply (YoY) (NOV)	03-01-2020	14:30	EUR	-	0.056
German Consumer Price Index (YoY) (DEC P)	03-01-2020	18:30	EUR	-	0.011
Nationwide House Px n.s.a. (YoY) (DEC)	03-01-2020	12:30	GBP	-	0.008
Consumer Credit (YoY) (NOV)	03-01-2020	15:00	GBP	-	0.061
BRC Shop Price Index (YoY) (DEC)	03-01-2020	5:31	GBP	-	(0.005)
ISM Employment (DEC)	03-01-2020	20:30	USD	-	46.6
EIA Natural Gas Storage Change (DEC 27)	03-01-2020	21:00	USD	-	(161)
DOE U.S. Crude Oil Inventories (DEC 27)	03-01-2020	21:30	USD	-	-
Fed's Barkin Speaks to Bankers in Baltimore	03-01-2020	21:35	USD	-	-
Baker Hughes U.S. Rig Count (JAN 3)	03-01-2020	23:30	USD	-	805
Fed's Brainard, Daly and Evans Speak on AEA Panel in San Diego	03-01-2020	23:45	USD	-	-

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