



03 Feb.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,662	(2.5) %	(0.1) %
BSE SENSEX	39,736	(2.4) %	2.2 %
CNX BANK	29,821	(3.3) %	(1.7) %
CNX MIDCAP	17,521	(2.7) %	(4.4) %
CNX SMALLCAP	6,057	(2.7) %	(10.1) %
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	0.4 %	0.4 %
EUR/USD	1.10	0.1 %	(1.7) %
GBP/USD	1.31	0.3 %	(1.0) %
USD/JPY	108.88	(0.2) %	0.2 %
USD/AUD	1.49	0.5 %	4.3 %
USD/SGD	1.36	0.2 %	1.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	1.1 %	(14.8) %
Gold(INR/10g)	40,694	0.0 %	4.4 %
Gold Comex(USD/oz)	1,585	0.8 %	2.8 %
SILVER(INR/1Kg)	46,383	0.0 %	0.7 %
Aluminium(USD/MT)	1,723	0.8 %	(2.8) %
Copper(USD/MT)	5,621	0.9 %	(8.8) %

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. MNI Indicators said its 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. The US personal income rose by 0.2 percent in December after climbing by a downwardly revised 0.4 percent in November. Eurozone economy logged its weakest growth in more than six years in the final quarter of 2019, as France and Italy contracted unexpectedly. According to the preliminary flash estimate from Eurostat, gross domestic product in the 19-nation bloc grew only 0.1 percent. Eurozone inflation accelerated for the third straight month in January. Inflation rose to 1.4 percent from 1.3 percent in December. Nonetheless, headline inflation remained well below the European Central Bank's target of "below, but close to 2 percent. Meanwhile, core inflation that excludes energy, food, alcohol and tobacco, eased more-than-expected to 1.1 percent in January from 1.3 percent a month ago.

Global Equities: DOW fell more than 2% on Coronavirus fears. Chinese markets plunged around 7% today as trading got underway after a long break.

Indian Economy: FM Sitharaman informed Parliament during Budget presentation that India's fiscal deficit is pegged at 3.8% for FY20 and 3.5% in 2021. Nominal GDP growth for FY21 revised to 10%. Net market borrowings is pegged at Rs 4.99 lakh crore for 2019-20 and Rs 5.36 lakh crore for 2020-21. Central government's debt has come down to 48.7% in March 2019 from 52.2% in March 2014. FM retained LTCG tax on equity mutual funds in the Union Budget. FM said that the government is proposing to sell a part of its holding in Life Insurance Corporation of India (LIC) by initial public offer. FM proposed a new income tax regime. However, to avail this scheme, which is optional, taxpayers will have to let go of exemptions.

Equity Markets: Domestic shares plunged in a special trading session on Saturday, as Union Budget announcements failed to lift investor sentiment. Lack of sectoral perks, confusion regarding income tax slabs and no tweaks in long-term capital gains (LTCG) tax led to a carnage in share prices. The barometer BSE S&P Sensex plunged 987.96 points or 2.43% to 39,735.53. The Nifty 50 index plummeted 300.25 points or 2.66% to 11,661.85.

Corporate News: Maruti Suzuki reported 1.6% rise in vehicle sales to 1,54,123 units in January 2020 from 1,51,721 units in January 2019. Domestic sales rose 1.7% to 1,44,499 units in January 2020 from 1,42,150 units in January 2019. Tata Motors reported 17.74% decline in total sales to 47,862 units in January 2020 from 58185 units in January 2019. Hero MotoCorp said the company sold 501622 units of two-wheelers in the month of January 2020, down 13.91% from 582660 units in January 2019. Motorcycles sales saw 6.45% decline in total sales to 494390 units in January 2020 from 528489 units in January 2019. Scooter sales plunged 86.65% to 7232 units in January 2020 from 54171 units in January 2019.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	87.6	90.3	45.8
MF(INR cr)	755.3	72.7	256.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,853	39,853	37,170
F&O(INR cr)	1,427,192	1,427,192	1,387,649

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.8	0	0
NSE VIX	16.8	16.8	16.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,821	(3.3) %	(1.7) %	Energy	14,426	(2.8) %	(12.7) %
IT	16,283	0.9 %	2.8 %	Pharma	8,014	(1.5) %	(14.5) %
Metals	2,481	(3.4) %	(20.0) %	Finance	13,759	(3.9) %	10.1 %
Auto	7,880	(2.6) %	(6.3) %	PSU	2,278	(3.7) %	(32.7) %
FMCG	30,197	(1.9) %	0.0 %	Real Estate	305	(7.9) %	14.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
P & G Hygi	11,985	9.0 %	11.1 %	DLF	229	(12.1) %	17.1 %
TCS	2,165	4.1 %	6.6 %	ICICI Pru	451	(11.7) %	24.5 %
Bajaj Hold	3,526	2.1 %	5.2 %	NMDC	105	(10.3) %	(0.4) %
Hind. Unil	2,075	2.0 %	22.8 %	SBI Life I	893	(10.2) %	49.3 %
Divi's Lab	1,987	1.8 %	15.3 %	Indiabulls	278	(9.2) %	(67.2) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Commodity Index AUD (JAN)	03-02-2020	11:00	AUD	-	116.4
AiG Performance of Manufacturing Index (JAN)	03-02-2020	3:00	AUD	-	48.3
CBA Australia PMI Mfg (JAN F)	03-02-2020	3:30	AUD	-	49.1
CoreLogic House Px (MoM) (JAN)	03-02-2020	4:30	AUD	-	0.012
TD Securities Inflation (YoY) (JAN)	03-02-2020	5:30	AUD	-	0.014
Building Approvals (YoY) (DEC)	03-02-2020	6:00	AUD	-	(0.038)
MLI Leading Indicator (MoM) (DEC)	03-02-2020	19:00	CAD	-	0.003
RBC Canadian Manufacturing PMI (JAN)	03-02-2020	20:00	CAD	-	50.4
PMI Manufacturing (JAN)	03-02-2020	14:00	CHF	-	50.2
Domestic Sight Deposits CHF (JAN 31)	03-02-2020	14:30	CHF	-	-
Industrial Profits (YoY) (DEC)	03-02-2020	7:00	CNY	-	0.054
Caixin China PMI Mfg (JAN)	03-02-2020	7:15	CNY	-	51.5
Markit/ADACI Italy Manufacturing PMI (JAN)	03-02-2020	14:15	EUR	-	46.2
Markit France Manufacturing PMI (JAN F)	03-02-2020	14:20	EUR	-	-
Markit/BME Germany Manufacturing PMI (JAN F)	03-02-2020	14:25	EUR	-	-
Markit UK PMI Manufacturing s.a. (JAN F)	03-02-2020	15:00	GBP	-	-
Vehicle Sales (YoY) (JAN)	03-02-2020	10:30	JPY	-	(0.095)
Treasury Publishes Monthly Economic Indicators	03-02-2020	6:30	NZD	-	-
Markit US Manufacturing PMI (JAN F)	03-02-2020	20:15	USD	-	-
ISM Employment (JAN)	03-02-2020	20:30	USD	-	45.1

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