



03 Feb.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,755	0.7 %	78.8 %
BSE SENSEX	49,798	2.5 %	77.7 %
CNX BANK	34,556	0.8 %	89.8 %
CNX MIDCAP	22,278	0.7 %	94.2 %
CNX SMALLCAP	7,465	0.7 %	110.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,687	1.6 %	0.3 %
S&P 500	3,826	1.4 %	1.9 %
FTSE 100	6,517	0.8 %	(0.8) %
HANG SENG	29,249	1.2 %	6.5 %
NIKKEI	28,362	1.0 %	4.0 %
SHANGHAI COMPOSITE	3,534	0.8 %	0.9 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.07	0.1 %	0.2 %
EUR/USD	1.21	(0.1) %	(1.4) %
GBP/USD	1.37	0.1 %	0.4 %
USD/JPY	104.85	0.5 %	1.6 %
USD/AUD	1.31	0.1 %	1.0 %
USD/SGD	1.33	0.1 %	0.7 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	2.6 %	12.5 %
Gold(INR/10g)	48,182	(1.1) %	(5.5) %
Gold Comex(USD/oz)	1,846	(1.1) %	(5.3) %
SILVER(INR/1Kg)	69,902	(4.1) %	1.5 %
Aluminium(USD/MT)	1,958	(1.4) %	(2.8) %
Copper(USD/MT)	7,755	(0.9) %	(2.1) %

**FIXED INCOME**

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

**Global Economy:** Americans are a little more optimistic about the outlook for the U.S. economy as vaccinations pick up speed and Covid-19 cases come off their peak. The IBD/TIPP Economic Optimism Index, an early monthly read on consumer confidence, gained 1.8 points to 51.9 in February. Readings above the neutral 50 level reflect optimism. Due to the restrictions related to Covid-19, the euro area economy contracted in the fourth quarter after bouncing back in the preceding three months, preliminary flash estimate published by Eurostat showed on Tuesday. Gross domestic product fell 0.7% sequentially, in contrast to a sharp growth of 12.4% in the third quarter. UK house prices growth slowed in January for the first time in six months, data from the Nationwide Building Society showed on Tuesday. House prices rose 6.4% on a yearly basis, but slower than the 7.3% increase recorded in December. On a monthly basis, house prices dropped 0.3%, following a 0.9% rise seen in December. Australia's central bank left its key interest rate unchanged on Tuesday and raised the size of the asset purchase programme. The board decided to maintain the targets of 10 basis points for the cash rate and the yield on the 3-year Australian Government bond, as well as the parameters of the Term Funding Facility. But the board decided to buy an additional A\$100 billion of bonds issued by the Australian Government and states and territories when the current bond purchase program is completed in mid April. These additional purchases will be at the current rate of A\$5 billion a week. The bank is not expecting to raise its interest rates until 2024.

**Global Equities:** The US stocks soared sharply as earnings took centre stage. Upbeat economic cues also supported sentiments.

**Indian Economy:** India's merchandise exports in January 2021 were USD 27.24 billion as compared to USD 25.85 billion in January 2020, an increase of 5.37%. Exports during April-January 2020-21 were USD 228.04 billion, as compared to USD 264.13 billion during the same period last year, exhibiting a negative growth of 13.66%. India's merchandise imports in January 2021 were USD 41.99 billion, as compared to USD 41.15 billion in January 2020, an increase of 2.05%. Merchandise imports during April-January 2020-21 were USD 300.26 billion, as compared to USD 405.33 billion during the same period last year, exhibiting a negative growth of 25.92%.

**Equity Markets:** Benchmark indices rallied for the second day on Tuesday, as investors cheered the Union Budget announcements. Positive global cues also lifted the sentiment. The Nifty managed to close near 14,650 level.

**Corporate News:** Infosys has received a digital transformation contract from Siemens Gamesa Renewable Energy. Housing Development Finance Corp Ltd said home loan demand has strengthened across different categories mainly due to softer property prices, low interest rates and concessional stamp duties. HDFC's total loans increased 9% Rs 5.52 lakh crore up from Rs 5.05 lakh crore in the previous year, 76% of the loans to individuals, 11% to construction finance and 6% to corporates. Tata Consumer Products reported a consolidated profit at Rs 218.2 crore in Q3FY21 against Rs 169.3 crore in Q3YFY20 while the revenue rose to Rs 3,069.6 crore from Rs 2,493 crore YoY. The company will acquire Kottaram Agro Foods for Rs 156 crore. PNC Infratech said the company's subsidiary received financial closure for Uttar Pradesh project.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	253.2	253.2	156.3
MF(INR cr)	6,043.0	6,043.0	(489.4)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	107,338	100,060	60,436
F&O(INR cr)	4,168,709	4,011,203	2,249,521

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.6	27.9	28.7
NSE VIX	23.4	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	34,268	3.6 %	88.2 %	Energy	16,951	2.2 %	57.4 %
IT	25,448	2.1 %	111.3 %	Pharma	12,362	2.1 %	75.9 %
Metals	3,289	1.9 %	111.7 %	Finance	16,209	3.2 %	81.3 %
Auto	10,639	4.0 %	128.4 %	PSU	2,024	3.5 %	57.7 %
FMCG	33,731	0.1 %	28.0 %	Real Estate	337	3.8 %	96.0 %

### 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>
Tata Motor	322	15.2 %	373.9 %	ICICI Pru	475	(3.0) %	38.6 %
Siemens	1,819	7.9 %	67.6 %	HDFC Life	681	(2.6) %	58.4 %
Shree Ceme	26,433	7.7 %	59.7 %	Bajaj Fins	9,476	(2.5) %	110.5 %
St Bk of I	333	7.2 %	78.6 %	P & G Hygi	11,121	(1.6) %	6.8 %
Piramal En	1,501	6.9 %	60.3 %	Tata Consu	575	(1.5) %	105.5 %

### EVENTS CALENDAR

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

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