



04 Feb.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,790	1.0 %	79.2 %
BSE SENSEX	50,256	0.9 %	77.8 %
CNX BANK	34,758	1.4 %	90.9 %
CNX MIDCAP	22,435	1.4 %	95.6 %
CNX SMALLCAP	7,501	1.2 %	111.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,724	0.1 %	0.4 %
S&P 500	3,830	0.1 %	2.0 %
FTSE 100	6,508	(0.1) %	(1.0) %
HANG SENG	29,307	0.2 %	6.7 %
NIKKEI	28,647	1.0 %	5.1 %
SHANGHAI COMPOSITE	3,517	(0.5) %	0.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.00	0.2 %	0.1 %
EUR/USD	1.20	(0.7) %	(1.7) %
GBP/USD	1.37	(0.2) %	0.1 %
USD/JPY	105.00	0.2 %	1.8 %
USD/AUD	1.31	0.4 %	1.3 %
USD/SGD	1.33	0.2 %	0.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	2.3 %	15.0 %
Gold(INR/10g)	47,768	(0.9) %	(6.4) %
Gold Comex(USD/oz)	1,846	(1.1) %	(5.3) %
SILVER(INR/1Kg)	67,215	(3.8) %	(2.4) %
Aluminium(USD/MT)	1,958	(1.4) %	(2.8) %
Copper(USD/MT)	7,756	(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: A report released by the Institute for Supply Management on Wednesday showed US service sector activity grew at an accelerated rate in the month of January. The ISM said its services PMI inched up to 58.7 in January from a revised 57.7 in December, with a reading above 50 indicating growth in the service sector. ADP said private sector employment jumped by 174,000 jobs in January after decreasing by a revised 78,000 jobs in December. Euro area private sector contracted further in January amid the Covid-19 pandemic as the decline in services was only partially offset by the growth in manufacturing sector, final survey results from IHS Markit showed on Wednesday. The final composite output index dropped to 47.8 in January from 49.1 in the previous month but was above the flash score of 47.5. At 45.4, the services Purchasing Managers' Index was down from December's 46.4 but above the flash 45.0. China services sector continued to expand in January with a services PMI Score of 52.0, the latest survey from Caixin showed on Wednesday. That's down from 56.3 in December, although it remains above the boom-or-bust line of 50 that separates expansion from contraction. The survey also showed that the composite index fell to 52.2 from 55.8 in December. The UK service sector contracted at the fastest pace in eight months in January. The Markit/Chartered Institute of Procurement & Supply services Purchasing Managers' Index plummeted to 41.2 from 50.4. Japan composite index fell to 47.1 from 48.5 in December.

Global Equities: The US stocks saw choppy moves as traders eyed earnings. Upbeat economic cues kept sentiments mostly supported.

Indian Economy: Ministry of Commerce & Industry Anup Wadhawan has stated that the Budget 2021-22 will enhance India's growth in manufacturing, trade and other sectors. The budget extensively and comprehensively envisages several initiatives and areas of focus, aimed at enhancing India's overall competitiveness and manufacturing capacities, which would enable growth, diversification and technological enhancement of India's exports. These cover both ease of doing business in the area of approvals and procedures, and the physical environment for investment, targeting a plug and play eco-system for investors. Briefing the media on the Budget 2021-22 initiatives, the Commerce Secretary said that one primary area of focus is the creation of a robust infrastructure, logistics and utilities environment for the manufacturing sector.

Equity Markets: Benchmark indices surged for third consecutive session on Wednesday, as euphoria surrounding the Union Budget continued. The Nifty closed tad below the crucial 14,800 mark and scaling that level in intraday trade. The BSE Sensex closed above 50,000 mark for the first. Barring the Nifty Realty index, all the sectoral indices on the NSE ended in green.

Corporate News: Reliance Industries Ltd has sourced the world's first consignment of 'carbon-neutral oil' from the US as it looks to become a net zero-carbon company by 2035. State Bank of India, Hero MotoCorp, Adani Power, Adani Transmission, Arvind, Container Corporation, HPCL will be in focus ahead of latest quarterly earnings. Top carmaker Maruti Suzuki India announced its partnership with ALD Automotive India, the operational leasing and fleet management business line of the Société Générale Group, for its subscription program.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	933.0	593.1	160.1
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)	97,475	99,199	60,613
F&O(INR cr)	4,211,838	4,078,081	2,258,822

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.6	27.9	28.7
NSE VIX	23.8	23.5	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	34,758	1.4 %	90.9 %	Energy	17,222	1.6 %	59.9 %
IT	25,681	0.9 %	113.2 %	Pharma	12,707	2.8 %	80.8 %
Metals	3,344	1.7 %	115.3 %	Finance	16,404	1.2 %	83.4 %
Auto	10,749	1.0 %	130.8 %	PSU	2,077	2.6 %	61.9 %
FMCG	33,682	(0.1) %	27.8 %	Real Estate	336	(0.4) %	95.1 %

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	1,049	7.5 %	206.4 %	Ambuja Cem	269	(2.6) %	71.7 %
L & T Info	4,306	6.6 %	209.2 %	ACC	1,728	(2.0) %	79.3 %
Power Grid	207	6.3 %	33.6 %	Marico	416	(1.9) %	56.6 %
Punjab Nat	38	5.9 %	25.9 %	Shree Ceme	25,994	(1.7) %	57.1 %
Power Fin.	125	5.0 %	40.6 %	Indraprast	546	(1.6) %	39.8 %

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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