



05 Jan.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,106	(0.2) %	70.9 %
BSE SENSEX	48,177	0.6 %	70.3 %
CNX BANK	31,212	0.0 %	71.4 %
CNX MIDCAP	21,368	(0.1) %	86.3 %
CNX SMALLCAP	7,277	0.3 %	105.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,224	(1.3) %	(1.3) %
S&P 500	3,701	(1.5) %	(1.5) %
FTSE 100	6,572	1.7 %	0.0 %
HANG SENG	27,473	0.9 %	0.0 %
NIKKEI	27,258	(0.7) %	0.0 %
SHANGHAI COMPOSITE	3,503	0.9 %	0.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.89	(0.1) %	(0.1) %
EUR/USD	1.22	(0.4) %	(0.4) %
GBP/USD	1.37	0.1 %	0.1 %
USD/JPY	103.33	0.2 %	0.2 %
USD/AUD	1.30	0.2 %	0.2 %
USD/SGD	1.32	(0.0) %	(0.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.0 %	(21.0) %
Gold(INR/10g)	51,012	2.0 %	0.0 %
Gold Comex(USD/oz)	1,895	0.2 %	22.8 %
SILVER(INR/1Kg)	68,861	2.3 %	0.0 %
Aluminium(USD/MT)	2,049	1.0 %	15.6 %
Copper(USD/MT)	7,964	0.9 %	29.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	0.9	0.0 %	(1.0) %

Global Economy: The US manufacturing activity picked up at its fastest pace in more than six years in December, extending a recovery in the factory sector. IHS Markit said its manufacturing PMI climbed to 57.1 in December from 56.7 in November. The index also improved from its preliminary reading in mid-December of 56.5, with a reading above 50 signaling expansion in activity. The US construction spending climbed by 0.9% to an annual rate of \$1.459 trillion in November after surging up by 1.6% to a revised rate of \$1.447 trillion in October. China's manufacturing sector continued to expand in December, with a manufacturing PMI score of 53.0, a survey from Caixin revealed on Monday. That was down from 54.9 in November - although it remains above the boom-or-bust line of 50 that separates expansion from contraction. Individually, output and new work expands at slower but still marked rates. Staffing levels stagnated despite a further uptick in backlogs of work, while input costs increased at the quickest rate in three years. Eurozone manufacturing Purchasing Managers' Index rose to 55.2 in December from 53.8 in November, final data from IHS Markit showed Monday. The reading was below the flash estimate of 55.5. The headline reading was above the crucial 50.0 no-change mark that separates growth from contraction for a sixth successive month. Manufacturing output increased for the sixth straight month. The improvement was linked to a similar-sized increase in new orders. However, firms on average made further cuts to their staffing levels, extending the current period of decline to 20 months.

Global Equities: The US stocks saw sharp retreat as escalating Covid-19 spread in UK and heavy profit selling pressure weighed on the markets.

Indian Economy: The health of the Indian manufacturing sector continued to strengthen in December, with manufacturers stepping up production and input buying amid efforts to rebuild their inventories following business closures earlier in the year. The seasonally adjusted IHS Markit India Manufacturing Purchasing Managers Index was at 56.4 in December, a tick higher than November's reading of 56.3 and above the critical 50.0 threshold for the fifth straight month. The latest figure was consistent with a marked improvement in business conditions across the sector. Reflecting the loosening of COVID-19 restrictions, strengthening demand and improved market conditions, factory orders increased during December. In response, firms lifted production again. In both cases, rates of expansion remained sharp despite easing to four-month lows.

Equity Markets: Domestic equity benchmarks closed with strong gains on Monday. Metal and IT stocks were in demand while banks stocks lagged. The Sensex scaled a record high of 48,220.47 while the Nifty hit an all-time high of 14,147.95 in late trade today. Positive global cues and developments surrounding COVID-19 vaccine cheered investors.

Corporate News: HDFC Ltd said its disbursements in the individual loan category have grown by 26% during the third quarter ended December 2020. The individual loan business continued to see improvements during the December quarter. Sun Pharma started Phase-2 trials of oral drug SCD-044 in patients with moderate to severe plaque psoriasis. NBCC has been awarded a work order worth Rs 351 crore to Gaursons Hi-Tech.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	161.6	161.6	162.0
MF(INR cr)	(1,156.3)	(1,490.2)	(493.3)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	4,402	24,547	58,136
F&O(INR cr)	2,411,221	1,697,132	2,083,464

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.6	21.9	29.2
NSE VIX	20.0	19.8	26.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,212	(0.0) %	71.4 %	Energy	17,176	1.2 %	59.5 %
IT	25,110	2.7 %	108.5 %	Pharma	13,150	1.1 %	87.1 %
Metals	3,425	5.1 %	120.4 %	Finance	15,193	0.1 %	69.9 %
Auto	9,418	1.6 %	102.2 %	PSU	1,830	1.1 %	42.6 %
FMCG	34,620	0.7 %	31.3 %	Real Estate	317	0.3 %	84.5 %

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 Steel	693	7.8 %	160.2 %	Hero Motoc	3,044	(1.9) %	85.6 %
Hindalco I	254	6.7 %	177.5 %	Kotak Mah.	1,966	(1.4) %	66.3 %
NMDC	122	5.2 %	55.8 %	Bajaj Fina	5,216	(1.2) %	135.0 %
Eicher Mot	2,656	4.4 %	104.3 %	Adani Port	499	(1.0) %	103.8 %
SBI Cards	888	4.2 %	46.1 %	Bandhan Ba	397	(0.8) %	103.7 %

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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