



05 Feb.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,980	0.0 %	2.7 %
BSE SENSEX	40,789	2.3 %	4.9 %
CNX BANK	30,687	0.0 %	1.2 %
CNX MIDCAP	17,910	0.0 %	(2.3) %
CNX SMALLCAP	6,154	0.0 %	(8.7) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,808	1.4 %	0.9 %
S&P 500	3,298	1.5 %	2.1 %
FTSE 100	7,440	1.6 %	(2.2) %
HANG SENG	26,676	1.2 %	(6.5) %
NIKKEI	23,085	0.5 %	(0.5) %
SHANGHAI COMPOSITE	2,783	1.3 %	(9.8) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.40	(0.1) %	0.3 %
EUR/USD	1.11	0.4 %	(1.3) %
GBP/USD	1.31	0.2 %	(0.8) %
USD/JPY	108.58	(0.3) %	(0.1) %
USD/AUD	1.49	0.5 %	4.8 %
USD/SGD	1.37	0.4 %	1.7 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	4.1 %	(14.8) %
Gold(INR/10g)	40,471	(0.6) %	3.8 %
Gold Comex(USD/oz)	1,555	(1.3) %	0.8 %
SILVER(INR/1Kg)	45,996	(0.5) %	(0.1) %
Aluminium(USD/MT)	1,723	2.1 %	(2.8) %
Copper(USD/MT)	5,621	(0.5) %	(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	1.6	0.1 %	(0.3) %

**Global Economy:** The US Commerce Department released a report on Tuesday showing new orders for US manufactured goods spiked by more than anticipated in the month of December. The Commerce Department said factory orders surged up by 1.8% in December after tumbling by a revised 1.2% in November. Eurozone producer prices decreased 0.7% on a yearly basis, slower than the 1.4% fall in November, data from Eurostat showed Tuesday. Excluding energy, producer price inflation slowed to 0.5% from 0.3%. Data showed that producer prices of intermediate goods were down 1.1% and that of energy slid 4%. Capital goods prices gained 1.5% and durable consumer goods prices moved up 1.3%. The UK construction sector contracted at a slower pace in January as receding political uncertainty boosted client demand, survey data from IHS Markit showed Tuesday. The IHS Markit/Chartered Institute of Procurement & Supply construction Purchasing Managers' Index rose to 48.4 in January from 44.4 in December. This was the slowest fall in eight months. Residential work dropped at the slowest pace since May 2019. Japan monetary base was up 2.9% on year to 514.132 trillion yen in January, the Bank of Japan said on Tuesday, slowing from an annual 3.2% growth in December. Banknotes in circulation and coins in circulation both rose 2.2% on year, while current account balances gained 3.1% and reserve balances climbed 2.7%. Reserve Bank of Australia kept its interest rate unchanged on Tuesday, as policymakers see gradual progress in inflation reaching target and towards full employment. The board of the Reserve Bank of Australia, governed by Philip Lowe, decided to leave the cash rate unchanged at a record 0.75%. The central bank had lowered the rate by 25 basis points in October 2019.

**Global Equities:** The US stocks jumped as Chinese stocks rebounded following the nosedive seen as trading resumed on Monday. The tech-heavy Nasdaq reached a new record closing high. The Dow jumped 1.4% on the day

**Equity Markets:** Key equity benchmarks ended with robust gains on Tuesday, supported by steep slide in crude oil prices and positive global shares. Market sentiment also got a boost from sudden jump in manufacturing PMI. The IHS Markit India Manufacturing Purchasing Managers' Index (PMI) jumped from 52.7 in December to 55.3 in January, its highest level in just under eight years. The barometer BSE S&P Sensex rallied 917.07 points or 2.30% to 40,789.38, its highest closing level since 30 January 2020. The Nifty 50 index climbed 271.75 points or 2.32% to 11,979.65, its highest closing level since 30 January 2020.

**Indian Economy:** Finance Minister Nirmala Sitharaman said that the core idea in this Budget has been to discuss the steps required and think through them and the government has carried the agenda which came up during discussions not only in Delhi but throughout the country further, and then fine-tuned them. She stressed that emphasis has been on creating a trust-based tax system. Amitabh Kant, CEO, NITI Aayog, said that the key challenge is to focus very strongly on reviving the animal spirits of the private sector and revival of the credit flow in Indian economy. As on 31st January, 2020, 446 sugar mills in the country have produced 141.12 lac tons of sugar, as compared to 185.59 lac tons produced by 520 mills last season on the corresponding date. This marks a decline of nearly 24% over the year.

**Corporate News:** Bharti Airtel reported a consolidated net loss of Rs 1035.20 crore against a net profit of Rs 86.20 crore on 2.05% rise in total income to Rs 22,173.90 crore in Q3 December 2019 over Q3 December 2018. The company added around 21 Mn 4G customers to its mobile network. Overall customer base stood at 419 million across 16 countries. Sun Pharmaceutical Industries said that one of its wholly owned subsidiaries has launched ABSORICA LD (isotretinoin) capsules in US for the management of severe recalcitrant nodular acne in patients 12 years of age and older. ABSORICA LD is the only isotretinoin formulation to feature Sun Pharma's micronization technology, which utilizes micronized particles to optimize absorption at a 20% lower dose.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	258.5	258.5	43.7
MF(INR cr)	0.0	(112.0)	247.9

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	3,136	29,431	37,046
F&O(INR cr)	1,647,160	1,468,970	1,388,627

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.0	0	0
NSE VIX	14.4	15.7	16.4

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,687	2.2 %	1.2 %	Energy	14,954	3.1 %	(9.5) %
IT	16,351	1.8 %	3.2 %	Pharma	8,122	1.9 %	(13.4) %
Metals	2,594	3.3 %	(16.4) %	Finance	14,219	2.9 %	13.8 %
Auto	8,101	1.4 %	(3.7) %	PSU	2,241	0.9 %	(33.8) %
FMCG	30,744	1.0 %	1.8 %	Real Estate	319	2.8 %	19.2 %

## 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>
Indiabulls	277	7.9 %	(67.3) %	Zee Entert	245	(4.7) %	(43.4) %
Titan Comp	1,276	7.5 %	13.9 %	Bajaj Auto	3,163	(3.7) %	8.5 %
Motherson	134	7.1 %	(12.8) %	Yes Bank	35	(2.9) %	(87.3) %
DLF	245	6.2 %	25.4 %	Oracle Fin	2,993	(2.9) %	(11.7) %
Shriram Tr	1,050	6.2 %	(15.1) %	Biocon	290	(2.8) %	(6.3) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
AiG Performance of Construction Index (JAN)	05-02-2020	3:00	AUD	-	38.9
CBA Australia PMI Composite (JAN F)	05-02-2020	3:30	AUD	-	48.6
RBA Governor Lowe Gives Speech in Sydney	05-02-2020	7:00	AUD	-	-
International Merchandise Trade (Canadian dollar) (DEC)	05-02-2020	19:00	CAD	-	-
Bank of Canada's Wilkins Gives Speech in Toronto	05-02-2020	23:00	CAD	-	-
SECO Consumer Confidence (1Q)	05-02-2020	12:15	CHF	-	(10.4)
Caixin China PMI Composite (JAN)	05-02-2020	7:15	CNY	-	52.6
ECB Vice President Guindos Speaks in Frankfurt	05-02-2020	13:40	EUR	-	-
Markit Italy Composite PMI (JAN)	05-02-2020	14:15	EUR	-	49.3
Markit France Composite PMI (JAN F)	05-02-2020	14:20	EUR	-	51.5
Markit Germany Services PMI (JAN F)	05-02-2020	14:25	EUR	-	54.2
Markit Eurozone Composite PMI (JAN F)	05-02-2020	14:30	EUR	-	50.9
Euro-Zone Retail Sales (YoY) (DEC)	05-02-2020	15:30	EUR	-	0.022
ECB Chief Economist Lane Speaks in Berlin	05-02-2020	17:00	EUR	-	-
ECB President Lagarde Speaks in Paris	05-02-2020	17:45	EUR	-	-
Markit/CIPS UK Composite PMI (JAN F)	05-02-2020	15:00	GBP	-	52.4
Jibun Bank Japan PMI Composite (JAN F)	05-02-2020	6:00	JPY	-	51.1
Employment Change (YoY) (4Q)	05-02-2020	3:15	NZD	-	0.009
ANZ Commodity Price (JAN)	05-02-2020	5:30	NZD	-	(0.028)
MBA Mortgage Applications (JAN 31)	05-02-2020	17:30	USD	-	0.072
ADP Employment Change (JAN)	05-02-2020	18:45	USD	-	-
Markit US Composite PMI (JAN F)	05-02-2020	20:15	USD	-	53.1
ISM Non-Manufacturing/Services Composite (JAN)	05-02-2020	20:30	USD	-	55
DOE U.S. Crude Oil Inventories (JAN 31)	05-02-2020	21:00	USD	-	-

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