



05 Feb.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,896	0.7 %	80.5 %
BSE SENSEX	50,614	0.7 %	79.1 %
CNX BANK	35,345	1.7 %	94.1 %
CNX MIDCAP	22,673	1.1 %	97.7 %
CNX SMALLCAP	7,617	1.5 %	115.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,056	1.1 %	1.5 %
S&P 500	3,872	1.1 %	3.1 %
FTSE 100	6,504	(0.1) %	(1.0) %
HANG SENG	29,114	(0.7) %	6.0 %
NIKKEI	28,342	(1.1) %	4.0 %
SHANGHAI COMPOSITE	3,502	(0.4) %	(0.0) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.89	(0.2) %	(0.1) %
EUR/USD	1.20	(0.5) %	(1.9) %
GBP/USD	1.37	(0.4) %	0.0 %
USD/JPY	105.04	0.2 %	1.8 %
USD/AUD	1.31	0.2 %	1.2 %
USD/SGD	1.33	0.1 %	0.8 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	1.0 %	18.1 %
Gold(INR/10g)	47,263	(1.1) %	(7.3) %
Gold Comex(USD/oz)	1,798	(2.1) %	(7.8) %
SILVER(INR/1Kg)	66,788	(0.6) %	(3.0) %
Aluminium(USD/MT)	1,980	0.3 %	(1.7) %
Copper(USD/MT)	7,834	0.0 %	(1.1) %

**FIXED INCOME**

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

**Global Economy:** The new orders for US manufactured goods showed another significant increase in the month of December, according to a report released by the Commerce Department on Thursday. The report said factory orders jumped by 1.1% in December after surging up by 1.3% for three consecutive months. The US initial jobless claims fell to 779,000, a decrease of 33,000 from the previous week's revised level of 812,000. Eurozone retail sales grew in December after a sharp fall in November, data from Eurostat revealed on Thursday. Retail sales increased 2% month-on-month in December, in contrast to a fall of 5.7% in November. Germany's construction sector contracted further in January, survey results from IHS Markit showed Thursday. The construction Purchasing Managers' Index dropped to 46.6 in January from 47.1 in December. A score below 50 indicates contraction. The decline was led by a sustained downturn in work on commercial building projects. Commercial construction activity saw a sharp dip while residential construction work increased for the seventh straight month. Bank of England Monetary Policy Committee voted to hold the interest rate at 0.10% and the quantitative easing at GBP 895 billion in the latest policy meeting. The policymakers did not wish to send any signal that they intended to set a negative bank rate at some point in the future. However, they concluded that it would be appropriate to start preparations to provide the capability to do so if necessary in the future. Australia business confidence improved sharply in the fourth quarter, suggesting a strong rebound from the large pandemic-related hit to activity in early 2020, survey results from NAB showed on Thursday. The business confidence index rose 22 points to +14 from -8 in the third quarter. Australia posted a seasonally adjusted merchandise trade surplus of A\$6.785 billion in December, the Australian Bureau of Statistics said on Thursday. This followed the downwardly revised A\$5.014 billion surplus in November (originally A\$5.022 billion).

**Global Equities:** The US stocks continued to soar on firm economic cues with major indices rallying around 1%.

**Indian Economy:** Government of India has announced the sale (re-issue) of Government Stock through auctions to be held on February 5, 2021. These include 3.96% GS 2022 (Rs 2000 crore), 5.15% GS 2025 (Rs 11000 crore), Rs 5.85% GS 2030 (Rs 11000 crore), 6.80% GS 2060 (Rs 7000 crore). The underwriting auction will be conducted through multiple price-based method on February 5, 2021.

**Equity Markets:** Benchmark indices surged to new record high levels on Thursday, as euphoria surrounding the Union Budget continued for fourth trading session. The Nifty closed tad below the crucial 14,900 mark after scaling that level in intraday trade. The BSE Sensex closed above 50,000 mark for the second session.

**Corporate News:** Bharat Electronics entered into an offset contract with Russian company JSC Rosoboronexport. Container Corporation of India: reported a higher consolidated profit at Rs 234.3 crore for Q3FY21 against Rs 180.9 crore in Q3FY20 while its revenue rose to Rs 1,766.9 crore from Rs 1,544.7 crore in the year-ago period. Biocon: signed an agreement with the Clinton Health Access Initiative (CHAI), to expand access to lifesaving cancer biosimilars in over 30 countries in Africa & Asia. Tata Power posted higher consolidated profit at Rs 318.4 crore in Q3FY21 against Rs 260.1 crore in Q3FY20, while revenue increased to Rs 7,597.9 crore from Rs 7,071 crore YoY.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	367.6	517.9	161.1
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)	96,831	98,607	60,785
F&O(INR cr)	8,455,619	5,172,465	2,288,052

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.8	25.1	28.6
NSE VIX	23.1	23.4	25.9

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,345	1.7 %	94.1 %	Energy	17,463	1.4 %	62.1 %
IT	25,570	(0.4) %	112.3 %	Pharma	12,739	0.3 %	81.3 %
Metals	3,410	1.9 %	119.5 %	Finance	16,607	1.2 %	85.7 %
Auto	10,867	1.1 %	133.3 %	PSU	2,199	5.9 %	71.4 %
FMCG	34,508	2.5 %	30.9 %	Real Estate	339	1.0 %	97.0 %

### 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>
P & G Hygi	12,293	8.2 %	18.1 %	Asian Pain	2,402	(2.1) %	49.8 %
Bank of Ba	82	6.4 %	60.1 %	UPL	548	(1.8) %	79.2 %
ITC	230	6.1 %	38.2 %	Cipla	834	(1.7) %	101.7 %
St Bk of I	355	5.7 %	90.4 %	IndusInd B	1,032	(1.6) %	201.6 %
Punjab Nat	41	5.6 %	33.0 %	Tata Motor	326	(1.5) %	380.0 %

### 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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