



06 Jan.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,227	(0.5) %	4.8 %
BSE SENSEX	41,465	(0.4) %	6.7 %
CNX BANK	32,069	(1.2) %	5.7 %
CNX MIDCAP	17,292	(0.6) %	(5.7) %
CNX SMALLCAP	5,961	(0.0) %	(11.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,635	(0.8) %	0.3 %
S&P 500	3,235	(0.7) %	0.1 %
FTSE 100	7,622	0.2 %	0.2 %
HANG SENG	28,452	(0.3) %	(0.3) %
NIKKEI	23,657	(0.8) %	20.9 %
SHANGHAI COMPOSITE	3,084	(0.1) %	(0.0) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.21	0.2 %	0.0 %
EUR/USD	1.12	(0.2) %	(0.2) %
GBP/USD	1.32	(0.5) %	0.0 %
USD/JPY	108.66	(0.0) %	0.0 %
USD/AUD	1.43	0.3 %	0.3 %
USD/SGD	1.35	0.0 %	0.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	0.2 %	0.0 %
Gold(INR/10g)	39,948	2.3 %	2.4 %
Gold Comex(USD/oz)	1,555	0.8 %	0.8 %
SILVER(INR/1Kg)	47,307	2.3 %	2.7 %
Aluminium(USD/MT)	1,758	(0.8) %	(0.8) %
Copper(USD/MT)	6,077	(1.4) %	(1.4) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.8	(0.1) %	(0.1) %

**Global Economy:** The minutes of the Fed's December meeting showed a few participants raised concerns that keeping interest rates low over a long period might encourage excessive risk-taking. The ISM said its US purchasing managers index fell to 47.2 in December from 48.1 in November, with a reading below 50 indicating a contraction in manufacturing activity. The annual growth in a broad measure of Eurozone money supply slowed in November, figures from the European Central Bank showed on Friday. M3, a broad monetary aggregate, grew 5.6% year-on-year after a 5.7% increase in October, which was revised from 5.6%. UK consumer credit grew at the slowest pace since 2014 and mortgage approvals increased marginally in November, monthly data from the Bank of England showed Friday. The extra amount borrowed by consumers in order to buy goods and services fell to GBP 0.6 billion in November. Germany's consumer price inflation was the highest in five months in December, preliminary data from the Federal Statistical Office showed on Friday. The consumer price index, or CPI, climbed 1.5% year-on-year following increases of 1.1% each of the previous two months.

**Global Equities:** US stocks tumbled amid rising geopolitical tensions following news a US airstrike killed Iranian military leader Qassem Soleimani.

**Indian Economy:** Agriculture Ministry data showed that rabi acreage rose by around 7% to 600.32 lakh hectares (lh) as on 3rd December 2019 over the corresponding week last year. The total planted area under winter crop the same week last year was 562 lh. Wheat acreage jumped nearly 9.30% to 313 lh. Pulses area also rose 2.81% to 146 lh. Area under Chana or Gram jumped 5.71% to 98.52 lh. Area under Oilseeds edged up marginally to 75.72 lh. Acreage under Mustard seed fell by 0.60% to 66.62 lh. Coarse cereals acreage continued to race higher, soaring by 12.73% to 49.40 lh. Maize are is at 13.70 lh, up 6.53% while Barley acreage is at 7.56 lh, up 7.23%.

**Equity Markets:** Domestic shares corrected on Friday, as flare up in geopolitical tensions between the US and Iran compelled investors to lock recent profits. Brent crude prices spurted amid fears of possible retaliation from Iran. Strong dollar boosted shares of IT and pharma firms in an otherwise weak market. The barometer index, the BSE Sensex, rose 162.03 points or 0.39% to 41,464.61. The Nifty 50 index rose 55.55 points or 0.45% to 12,226.65.

**Corporate News:** HDFC has cut its Retail Prime Lending on Housing Loan, on which its Adjustable Rate Home Loans (ARHL) are benchmarked, by 5 basis points with effect from January 6, 2020. Indian Overseas Bank has received capital infusion of Rs 4,360 crore from the government of India, the bank said on Saturday. Coal India has invited bids for supply, installation and commissioning of six electrical walking dragline along with spares and consumables with one-year warranty and additional spares & consumables for 10 years valued at Rs 1,176 crore. OMCs could continue to be under pressure. WTI Crude oil futures rose sharply in last session, hitting near three and half month high above \$63 per barrel on sustained worries over Middle East. Iran has ended commitment to 2015 landmark Nuclear Deal after the killing of Iranian General Qassem Soleimani. Tehran said in a statement that its nuclear program would have no limitations on enriching uranium.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	152.5	101.4	40.9
MF(INR cr)	256.3	256.3	278.8

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	34,163	29,736	37,208
F&O(INR cr)	955,836	1,659,594	1,356,259

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.0	13.2	15.0
NSE VIX	12.7	11.9	16.5

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,069	(1.2) %	5.7 %	Energy	16,055	(0.5) %	(2.9) %
IT	15,937	1.4 %	0.6 %	Pharma	8,112	0.7 %	(13.5) %
Metals	2,848	(0.8) %	(8.2) %	Finance	14,561	(0.9) %	16.5 %
Auto	8,168	(1.2) %	(2.9) %	PSU	2,524	(2.0) %	(25.4) %
FMCG	30,109	(0.5) %	(0.3) %	Real Estate	300	(0.4) %	12.1 %

## 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>
Sun Pharma	445	2.2 %	(7.2) %	Zee Entert	274	(5.5) %	(36.6) %
Interglobe	1,361	2.1 %	(3.9) %	Bank of Ba	101	(3.4) %	(24.0) %
ICICI Lomb	1,388	2.0 %	36.7 %	Punjab Nat	65	(2.5) %	(33.3) %
HCL Techno	585	2.0 %	5.3 %	DLF	229	(2.2) %	16.9 %
TCS	2,201	2.0 %	8.3 %	Asian Pain	1,751	(2.2) %	17.3 %

## 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 Manufacturing Index (DEC)	06-01-2020	3:00	AUD	-	48.1
CBA Australia PMI Composite (DEC F)	06-01-2020	3:30	AUD	-	49.4
Raw Materials Price Index (MoM) (NOV)	06-01-2020	19:00	CAD	-	(0.019)
Domestic Sight Deposits CHF (JAN 3)	06-01-2020	14:30	CHF	-	-
Caixin China PMI Composite (DEC)	06-01-2020	7:15	CNY	-	53.2
Markit Italy Composite PMI (DEC)	06-01-2020	14:15	EUR	-	49.6
Markit France Composite PMI (DEC F)	06-01-2020	14:20	EUR	-	52
Markit Germany Services PMI (DEC F)	06-01-2020	14:25	EUR	-	52
Euro-Zone Sentix Investor Confidence (JAN)	06-01-2020	15:00	EUR	-	0.7
Euro-Zone Producer Price Index (MoM) (NOV)	06-01-2020	15:30	EUR	-	0.001
Vehicle Sales (YoY) (DEC)	06-01-2020	10:30	JPY	-	(0.146)
Nikkei Japan PMI Manufacturing (DEC F)	06-01-2020	6:00	JPY	-	48.8
BOJ Outright Bond Purchase 10~25 Year	06-01-2020	6:40	JPY	-	-
Markit US Composite PMI (DEC F)	06-01-2020	20:15	USD	-	52.2
U.S. to Sell 13-Week Bills	06-01-2020	22:00	USD	-	-

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