



06 Feb.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,089	0.9 %	3.6 %
BSE SENSEX	41,143	0.9 %	5.8 %
CNX BANK	31,002	1.0 %	2.2 %
CNX MIDCAP	18,116	1.1 %	(1.2) %
CNX SMALLCAP	6,205	0.8 %	(7.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,291	1.7 %	2.6 %
S&P 500	3,335	1.1 %	3.2 %
FTSE 100	7,482	0.6 %	(1.6) %
HANG SENG	26,787	0.4 %	(6.2) %
NIKKEI	23,320	1.0 %	0.5 %
SHANGHAI COMPOSITE	2,818	1.3 %	(8.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.11	(0.5) %	(0.1) %
EUR/USD	1.10	(0.4) %	(1.5) %
GBP/USD	1.30	(1.4) %	(1.3) %
USD/JPY	109.11	0.7 %	0.4 %
USD/AUD	1.49	(0.6) %	4.4 %
USD/SGD	1.37	0.4 %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	4.1 %	(14.8) %
Gold(INR/10g)	40,059	(1.0) %	2.7 %
Gold Comex(USD/oz)	1,558	0.2 %	1.0 %
SILVER(INR/1Kg)	45,510	(1.1) %	(1.2) %
Aluminium(USD/MT)	1,723	2.0 %	(2.8) %
Copper(USD/MT)	5,621	(1.6) %	(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	1.7	0.1 %	(0.3) %

Global Economy: The ISM said its US non-manufacturing index rose to 55.5 in January from a revised 54.9 in December, with a reading above 50 indicating service sector growth. China's private sector logged a moderate growth in January, survey data from IHS Markit showed Wednesday. The Caixin composite output index fell to 51.9 in January from 52.6 in December. A score above 50 indicates expansion. The services Purchasing Managers' Index for the service sector came in at 51.8, down from 52.5 a month ago. Total new orders received by service providers expanded at a softer rate, in spite of a stronger increase in new work from abroad. Eurozone retail sales dropped in December, data from Eurostat revealed Wednesday. Retail turnover declined 1.6% in December from November, when it was up 0.8%. On a yearly basis, retail sales growth eased to 1.3% from 2.3% in November. The UK service sector rebounded in January driven by rising client demand after general election, final survey results from IHS Markit and Chartered Institute of Procurement & Supply showed Wednesday. The services Purchasing Managers' Index rose to 53.9 in January from 50.0 in December. The reading exceeded the flash estimate of 52.9. The sector expanded for the first time since last August 2019. The composite output index, which reflects the manufacturing and services activities, also jumped to 53.3 in January from 49.3 in December. Japan services sector continued to expand in January, albeit at a slower rate, the latest survey from Jibun Bank revealed on Wednesday with a PMI score of 51.0. That's down from 52.1 in December, although it remains further above the boom-or-bust line of 50 that separates expansion from contraction. The bank's composite index came in at 50.1 - down from 51.1 in the previous month. The Commonwealth Bank of Australia composite output index rose to 50.2 in January from 49.6 a month ago.

Global Equities: Investors continued to weigh the impact of China's effort to stimulate its economy and mitigate the coronavirus outbreak concerns. Nasdaq and the S&P 500 ended the session at new record closing highs.

Indian Economy: The Indian service sector started 2020 on a strong footing, with surging demand underpinning the fastest increases in new orders and output for seven years. As a result, job creation was sustained and business optimism maintained. Rising from 53.3 in December to 55.5 in January, the IHS Markit India Services Business Activity Index signalled the strongest upturn in output for seven years. The rebound largely stemmed from favourable market conditions and better underlying demand, according to survey participants. IHS Markit data showed that growth of private sector activity moved up a gear, amid broad-based accelerations across manufacturing and services. The Composite PMI Output Index increased from 53.7 in December to a seven-year high of 56.3 in January. The Union Cabinet on Wednesday approved amendments to the Banking Regulation Act to bring cooperative banks under the regulatory mechanism of Reserve Bank of India.

Equity Markets: Key indices advanced for third straight trading sessions on Wednesday. After a shaky start, the equity benchmarks turned volatile and hit the day's low by noon. The indices, however, bounced back and ended near the high point of the day. The Nifty managed to close slightly above the 12,000 level. The sentiment got a boost after India's Services PMI in January rose at quickest rates in seven years.

Corporate News: Avenue Supermarts, the company, which owns and operates popular supermarket chain DMart, launched a qualified institutional placement (QIP) offering to raise up to Rs 4,098 crore at Rs 2,049 per share. Funds will be used to expand the company's store network, invest in supply chain and also to repay loans. Hindustan Petroleum Corporation reported 167.80% rise in consolidated net profit to Rs 1,027.23 crore on 1.98% fall in total income to Rs 71,371.09 crore in Q3 December 2019 over Q3 December 2018. Hero MotoCorp and Eicher Motors will release numbers for the third quarter today, 6 February 2020.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	129.7	194.1	44.1
MF(INR cr)	586.2	181.1	252.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	47,939	44,843	37,304
F&O(INR cr)	1,960,374	1,591,821	1,391,349

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.1	0	0
NSE VIX	14.2	15.3	16.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,002	1.0 %	2.2 %	Energy	15,099	1.0 %	(8.7) %
IT	16,449	0.6 %	3.8 %	Pharma	8,126	0.0 %	(13.3) %
Metals	2,665	2.7 %	(14.1) %	Finance	14,408	1.3 %	15.3 %
Auto	8,132	0.4 %	(3.4) %	PSU	2,252	0.5 %	(33.5) %
FMCG	30,934	0.6 %	2.5 %	Real Estate	326	2.4 %	22.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tata Motor	184	10.9 %	(1.9) %	Zee Entert	227	(7.3) %	(47.5) %
Tata Motor	75	9.4 %	(18.4) %	Hero Motoc	2,373	(3.6) %	(7.2) %
Shriram Tr	1,133	8.0 %	(8.3) %	Dr Reddy's	3,133	(3.3) %	12.1 %
Yes Bank	38	7.6 %	(86.4) %	Power Grid	189	(2.6) %	(3.2) %
Power Fin.	123	5.9 %	2.5 %	Maruti Suz	7,041	(2.2) %	2.9 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
NAB Business Confidence (4Q)	06-02-2020	6:00	AUD	-	(2)
UBS Real Estate Bubble Index (4Q)	06-02-2020	12:30	CHF	-	0.93
ECB President Lagarde Speaks in Brussels	06-02-2020	13:30	EUR	-	-
Markit Germany Construction PMI (JAN)	06-02-2020	14:00	EUR	-	53.8
ECB Publishes Economic Bulletin	06-02-2020	14:30	EUR	-	-
Foreign Buying Japan Bonds (JAN 31)	06-02-2020	5:20	JPY	-	-
BOJ's Masai Speech in Nara	06-02-2020	7:00	JPY	-	-
Tokyo Avg Office Vacancies (JAN)	06-02-2020	7:30	JPY	-	1.55
Challenger Job Cuts (YoY) (JAN)	06-02-2020	18:00	USD	-	(0.252)
Continuing Claims (JAN 25)	06-02-2020	19:00	USD	-	-
Fed's Kaplan Speaks on Economic Outlook in Dallas	06-02-2020	19:45	USD	-	-
Fed's Brainard Discusses Payment Innovation	06-02-2020	2:40	USD	-	-
EIA Natural Gas Storage Change (JAN 31)	06-02-2020	21:00	USD	-	(201)
U.S. to Sell 4-Week Bills	06-02-2020	22:00	USD	-	-

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