



07 Jan.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,079	0.7 %	3.5 %
BSE SENSEX	40,677	(1.9) %	5.4 %
CNX BANK	31,598	1.2 %	4.2 %
CNX MIDCAP	17,016	0.7 %	(7.2) %
CNX SMALLCAP	5,882	0.9 %	(12.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,703	0.2 %	0.6 %
S&P 500	3,246	0.4 %	0.5 %
FTSE 100	7,575	(0.6) %	(0.4) %
HANG SENG	28,226	(0.8) %	(1.1) %
NIKKEI	23,205	(1.9) %	0.0 %
SHANGHAI COMPOSITE	3,083	(0.0) %	(0.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.64	0.8 %	0.6 %
EUR/USD	1.12	(0.5) %	(0.5) %
GBP/USD	1.31	(1.4) %	(0.9) %
USD/JPY	108.14	(0.5) %	(0.5) %
USD/AUD	1.44	1.1 %	1.0 %
USD/SGD	1.35	0.3 %	0.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	0.3 %	3.4 %
Gold(INR/10g)	40,678	1.8 %	4.3 %
Gold Comex(USD/oz)	1,559	0.2 %	1.1 %
SILVER(INR/1Kg)	47,941	1.3 %	4.1 %
Aluminium(USD/MT)	1,791	1.9 %	1.1 %
Copper(USD/MT)	6,098	0.3 %	(1.1) %

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	0.0 %	(0.1) %

Global Economy: China's private sector growth eased in December as both manufacturing and services logged weaker growth, survey data from IHS Markit showed Monday. The Caixin composite Purchasing Managers' Index fell to 52.6 from 53.2 in November. However, a score above 50 indicates expansion. The Purchasing Managers' Index for the service sector dropped to 52.5 from a seven-month high of 53.5 a month ago. Manufacturing output rose solidly at the end of the year, despite the rate of increase easing to a three-month low. The Euro area private sector expanded at a decent pace in December, final survey data from IHS Markit showed Monday. The composite output index rose to 50.9 in December from 50.6 in November. The flash reading was also 50.6. Germany retail turnover rose 2.1% in November from the previous month, offsetting the 1.3% decline in October. On a yearly basis, retail sales growth accelerated to 2.8% from 1.4% a month ago. UK IHS Markit/Chartered Institute of Procurement & Supply composite output index held steady at 49.3 in December. The latest reading was the joint-lowest since July 2016. Japan manufacturing sector weakened further in December, and at a faster rate, the latest survey from Nikkei revealed on Monday with a manufacturing PMI score of 48.4. That's down from 48.9 in November and it moves further beneath the boom-or-bust line of 50 that separates expansion from contraction.

Global Equities: US stocks rose after an initial drop as heavyweight technology companies led a rebound. The S&P 500 rose for the third time in four sessions.

Indian Economy: The Indian services economy gained growth momentum in December, shrugging off the weakness recorded in September and October. A marked and accelerated upturn in new work intakes boosted growth of output and employment, whilst supporting an uptick in business confidence. Worryingly, inflationary pressures intensified, with the fastest rise in input costs for almost seven years pushing output charge inflation to a 22-month high. The IHS Markit India Services Business Activity Index improved from 52.7 in November to 53.3 in December, highlighting the second-strongest rate of increase in output in over a year (behind July). Survey members linked the rise to better market conditions and new business growth. Total sales of Services companies expanded for the third consecutive month at the end of the year, and at the quickest pace since October 2016.

Equity Markets: Key domestic equity market slumped on Monday, as tensions in the Middle East dragged global shares lower. Investors fled riskier assets like equities in favor of safer alternatives like gold and bonds. Meanwhile, Brent crude oil climbed above \$70 a barrel, stoking fears of inflationary pressures. The barometer BSE S&P Sensex tanked 787.98 points or 1.90% to 40,676.63. The Nifty 50 index slumped 233.60 points or 1.91% to 11,993.05.

Corporate News: IT stocks could stay supported today. Indian Rupee continued to slip following a huge spike in the global crude oil prices. INR closed at 71.93 per US dollar, sliding by 13 paise on the day. The INR had tumbled by more than 40 paise in last session and tested around seven week low of 72.11 per US dollar in intraday moves. HDFC Bank announced operational performance for Q3 of FY 2020. In Q3 of FY 2020, advances grew 20% to Rs 9,34,000 crore, compared to Q3 of FY 2019. Deposits grew 25% to Rs 1,06,7500 crore as of 31 December 2019, up 25%, compared to Q3 of FY 2019. CASA ratio stood at around 39.5% as of 31 December 2019, as compared to 40.7% as of 31 December 2018 and 39.3 % as of 30 September 2019. During the quarter, the Bank purchased loans aggregating Rs 4258 crore through the direct assignment route under the home loan arrangement with Housing Development Finance Corporation. Mishra Dhatu Nigam (MIDHANI) said the company has dispatched its first consignment of ultra high strength steel for ignitor box and cobalt alloy for throat sitting rings for indigenous manned mission of Indian Space Research Organisation (ISRO) 'Gaganyaan' which will carry its "Vyomanauts" to space. Avenue Superrnarts has allotted listed Commercial Paper of Rs 100 crore on 6 January 2020. The company has issued said Commercial Paper within the overall limit of Rs 900 crore as approved by Board of Directors in their meeting held on 12 January 2019. The maturity date



is 25 February 2020. CRISIL has assigned rating of CRISIL A1+.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	181.6	128.2	41.7
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)	33,898	30,776	37,191
F&O(INR cr)	1,296,578	1,568,840	1,355,940

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.9	13.4	15.0
NSE VIX	14.8	12.6	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	31,237	(2.6) %	3.0 %	Energy	15,737	(2.0) %	(4.8) %
IT	15,880	(0.4) %	0.2 %	Pharma	7,987	(1.5) %	(14.8) %
Metals	2,766	(2.9) %	(10.8) %	Finance	14,203	(2.5) %	13.6 %
Auto	7,979	(2.3) %	(5.2) %	PSU	2,415	(4.3) %	(28.7) %
FMCG	29,799	(1.0) %	(1.3) %	Real Estate	292	(2.4) %	9.4 %

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>
New India	149	2.4 %	(21.1) %	Indiabulls	304	(7.6) %	(64.1) %
Titan Comp	1,159	1.7 %	3.4 %	H P C L	245	(7.2) %	(13.8) %
Godrej Con	697	1.2 %	3.0 %	Punjab Nat	61	(5.6) %	(37.0) %
SBI Life I	983	0.8 %	64.3 %	Bank of Ba	96	(5.0) %	(27.8) %
Wipro	252	0.4 %	(3.6) %	L&T Fin.Ho	113	(5.0) %	(26.0) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
ANZ Roy Morgan Weekly Consumer Confidence Index (JAN 6)	07-01-2020	4:00	AUD	-	108
ANZ Job Advertisements (MoM) (DEC)	07-01-2020	6:00	AUD	-	(0.017)
International Merchandise Trade (Canadian dollar) (NOV)	07-01-2020	19:00	CAD	-	-
Ivey Purchasing Managers Index s.a. (DEC)	07-01-2020	20:30	CAD	-	60
CPI EU Harmonized (YoY) (DEC)	07-01-2020	13:00	CHF	-	(0.003)
Markit Germany Construction PMI (DEC)	07-01-2020	14:00	EUR	-	52.5
Euro-Zone Consumer Price Index Core (YoY) (DEC P)	07-01-2020	15:30	EUR	-	0.013
Loans & Discounts Corp (YoY) (NOV)	07-01-2020	5:20	JPY	-	0.0224
QV House Prices (YoY) (DEC)	07-01-2020	21:30	NZD	-	0.033
U.S. to Sell USD38 Bln 3-Year Notes	07-01-2020	23:30	USD	-	-

..... End of Report

