



08 Jan.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,939	(0.9) %	2.3 %
BSE SENSEX	40,869	0.5 %	4.2 %
CNX BANK	30,996	(1.3) %	2.2 %
CNX MIDCAP	16,869	(0.9) %	(8.0) %
CNX SMALLCAP	5,826	(1.3) %	(13.5) %

  

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,584	(0.4) %	0.2 %
S&P 500	3,237	(0.3) %	0.2 %
FTSE 100	7,574	(0.0) %	(0.4) %
HANG SENG	28,322	0.3 %	(0.8) %
NIKKEI	23,576	1.6 %	1.6 %
SHANGHAI COMPOSITE	3,105	0.7 %	0.6 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.72	0.7 %	0.7 %
EUR/USD	1.12	(0.2) %	(0.4) %
GBP/USD	1.31	(0.3) %	(0.3) %
USD/JPY	108.46	(0.2) %	(0.2) %
USD/AUD	1.45	1.5 %	1.8 %
USD/SGD	1.35	0.2 %	0.3 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	0.3 %	3.4 %
Gold(INR/10g)	40,338	(0.8) %	3.4 %
Gold Comex(USD/oz)	1,592	2.1 %	3.2 %
SILVER(INR/1Kg)	47,184	(1.6) %	2.5 %
Aluminium(USD/MT)	1,794	0.2 %	1.2 %
Copper(USD/MT)	6,135	0.6 %	(0.5) %

**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) %	(0.2) %

**Global Economy:** US factory orders also fell by 0.7% in November after inching up by a downwardly revised 0.2 percent in October, a report released by the Commerce Department on Tuesday showed. The report said durable goods orders tumbled by 2.1% in November after edging up by 0.2% in October, reflecting a modest revision from the previously reported 2% slump. Eurozone retail sales rose at 1% on month in November, in contrast to a 0.3% drop logged in September and October, data from Eurostat showed Tuesday. Retail trade increased for the first time in three months on non-food product sales. Sales of food, drinks and tobacco advanced 0.7% and non-food product sales climbed 1.4%. Eurozone inflation rose to 1.3% in December from 1% in November, largely driven by food prices, flash data from Eurostat showed on Tuesday. On a monthly basis, consumer prices gained 0.3%. Headline inflation remained well below the European Central Bank's target of "below, but close to 2%." Core inflation that excludes energy, food, alcohol and tobacco, held steady at 1.3% in December. Germany's construction sector grew at the fastest pace in nine months in December, survey data from IHS Markit showed Tuesday. The construction Purchasing Managers' Index rose to 53.8 in December from 52.5 in November. Japan's Jibun Bank services Purchasing Managers' Index fell to 49.4 in December from 50.3 in November, survey data from IHS Markit showed Tuesday. A score below 50 indicates contraction. This was the second contraction in services output over the last three months and also the strongest fall in over three years.

**Global Equities:** Asian stocks rose yesterday after recent correction. Chinese shares hit eight-month highs on hopes of more policy support.

**Indian Economy:** The government announced the first advance estimates of the GDP growth for FY20, keeping the growth rate at 5%. The Gross Value Added (GVA) growth estimate is at 4.9%. The Indian economy grew at a six-year low of 4.5% in September quarter. The Insolvency and Bankruptcy Board of India (IBBI) notified the Insolvency and Bankruptcy Board of India (Liquidation Process) (Amendment) Regulations, 2020 on 6 January 2020. The amendment clarifies that a person, who is not eligible under the Code to submit a resolution plan for insolvency resolution of the corporate debtor, shall not be a party in any manner to a compromise or arrangement of the corporate debtor under section 230 of the Companies Act, 2013.

**Equity Markets:** Domestic shares bounced back on Tuesday, supported by positive global markets. The Nifty, however, failed to close above its 20 days simple daily moving average (DMA) placed at 12,140.44. Investors continued monitoring the geopolitical developments following Washington's targeted killing of Iran's top military commander Qasem Soleimani in Iraq. The barometer BSE S&P Sensex rose 192.84 points or 0.47% to 40,869.47. The Nifty 50 index advanced 59.90 points or 0.50% to 12,052.95.

**Corporate News:** Cyient inaugurated the state of the art 60,000 sq. ft. development center in Warangal. With this launch, Warangal gets the largest development center, paving the way for development of commercial and business infrastructure and attracting IT and other investments. The facility can accommodate 600 Cyient engineers on a total built-up area of around 60,000 sq. ft. The company is also constructing a second tower to accommodate an additional 200 engineers. NBCC (India) informed that the company secured the business of Rs 1090.53 crore during the month of December 2019. NHPC has informed that the company has raised Rs 500 crore on 3 January 2020 in second tranche through private placement of secured, redeemable, taxable, non-cumulative, non-convertible 7.38% NHPC-Y1 Series Bonds. Mahindra & Mahindra said that CARE Ratings has reaffirmed the company's long term rating on bank loan facilities at AAA with stable outlook. The short-term rating was reaffirmed at A1+.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	181.6	128.2	41.7
MF(INR cr)	(24.5)	17.8	271.7

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	35,354	31,692	37,181
F&O(INR cr)	1,828,329	1,620,738	1,358,453

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.8	13.5	15.0
NSE VIX	14.6	13.0	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	31,399	0.5 %	3.5 %	Energy	15,794	0.4 %	(4.5) %
IT	15,895	0.1 %	0.3 %	Pharma	8,037	0.6 %	(14.3) %
Metals	2,786	0.7 %	(10.2) %	Finance	14,315	0.8 %	14.5 %
Auto	8,003	0.3 %	(4.9) %	PSU	2,417	0.1 %	(28.6) %
FMCG	29,862	0.2 %	(1.1) %	Real Estate	298	1.9 %	11.5 %

## 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>
Shree Ceme	21,963	4.3 %	16.8 %	Bharti Inf	238	(1.9) %	(24.2) %
Vedanta	156	3.6 %	(17.4) %	B P C L	461	(1.7) %	17.6 %
Power Fin.	117	3.6 %	(2.5) %	Bajaj Hold	3,397	(1.5) %	1.3 %
L&T Fin.Ho	116	3.3 %	(23.6) %	Infosys	728	(1.5) %	(3.6) %
Interglobe	1,364	2.8 %	(3.7) %	Biocon	284	(1.4) %	(8.3) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Foreign Reserves (Australian dollar) (DEC)	08-01-2020	11:00	AUD	-	-
AiG Performance of Construction Index (DEC)	08-01-2020	3:00	AUD	-	40
Building Approvals (YoY) (NOV)	08-01-2020	6:00	AUD	-	(0.236)
German Factory Orders n.s.a. (YoY) (NOV)	08-01-2020	12:30	EUR	-	(0.055)
Euro-Zone Business Climate Indicator (DEC)	08-01-2020	15:30	EUR	-	(0.23)
Unit Labor Costs (YoY) (3Q)	08-01-2020	15:00	GBP	-	0.036
Consumer Confidence Index (DEC)	08-01-2020	10:30	JPY	-	38.7
Labor Cash Earnings (YoY) (NOV)	08-01-2020	5:00	JPY	-	0.005
MBA Mortgage Applications (JAN 3)	08-01-2020	17:30	USD	-	(0.053)
ADP Employment Change (DEC)	08-01-2020	18:45	USD	-	-
Fed's Brainard Speaks on the Community Reinvestment Act	08-01-2020	20:30	USD	-	-
DOE U.S. Crude Oil Inventories (JAN 3)	08-01-2020	21:00	USD	-	-
U.S. to Sell USD24 Bln 10-Year Notes	08-01-2020	23:30	USD	-	-

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