



09 Jan.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,162	1.1 %	4.2 %
BSE SENSEX	40,818	(0.1) %	6.1 %
CNX BANK	31,846	1.5 %	5.0 %
CNX MIDCAP	17,288	1.3 %	(5.7) %
CNX SMALLCAP	5,968	1.5 %	(11.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,745	0.6 %	0.7 %
S&P 500	3,253	0.5 %	0.7 %
FTSE 100	7,575	0.0 %	(0.4) %
HANG SENG	28,088	(0.8) %	(1.6) %
NIKKEI	23,205	(1.6) %	(0.0) %
SHANGHAI COMPOSITE	3,067	(1.2) %	(0.6) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.59	(0.1) %	0.5 %
EUR/USD	1.11	(0.2) %	(0.8) %
GBP/USD	1.31	0.3 %	(0.5) %
USD/JPY	108.66	0.5 %	0.0 %
USD/AUD	1.46	1.1 %	2.1 %
USD/SGD	1.35	0.0 %	0.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	63	(0.9) %	2.5 %
Gold(INR/10g)	40,694	0.9 %	4.4 %
Gold Comex(USD/oz)	1,562	(1.9) %	1.2 %
SILVER(INR/1Kg)	47,752	1.2 %	3.7 %
Aluminium(USD/MT)	1,772	(1.3) %	(0.0) %
Copper(USD/MT)	6,154	0.3 %	(0.2) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.9	0.1 %	(0.1) %

**Global Economy:** ADP said that US private sector employment jumped by 202,000 jobs in December after climbing by a substantially upwardly revised 124,000 jobs in November. Eurozone economic confidence rose to 101.5 in December from 101.2 in November, survey results from the European Commission showed Wednesday. Confidence among service providers, retailers and contractors strengthened at the end of the year, while industrial and consumer sentiment deteriorated from the previous month. Germany's factory orders decreased unexpectedly in November, figures from Destatis revealed Wednesday. New orders in manufacturing fell 1.3%, confounding expectations for an increase of 0.2%. Orders had increased by a revised 0.2% in October. Domestic orders grew 1.6%, while foreign orders fell 3.1% in November. UK house prices recorded fastest growth in a year in December, data from the Lloyds Bank subsidiary Halifax and IHS Markit showed on Wednesday. House prices increased 1.7% on a monthly basis, faster than the 1.2% increase in November. Australia construction sector continued to contract in December, with a six-and-a-half-year low PMI score of 38.9, the latest survey from the Australian Industry Group revealed on Wednesday. That's down from 40 in November and it moves further beneath the boom-or-bust line of 50 that separates expansion from contraction.

**Global Equities:** US stocks surged as US President Donald Trump said there were no American casualties in the overnight Iranian missile strikes and that Tehran appeared to be standing down, easing concerns of a continued conflict in the Middle East.

**Indian Economy:** With advance GDP estimates projecting FY20 GDP growth at 5%, it is a necessity now for the government to look at measures to infuse capital in the economy in a systematic way, noted FICCI. India's per-capita monthly income is estimated to clock a rise of 6.8% to Rs 11,254 during 2019-20, marking an increase compared to Rs 10,534 in previous fiscal. The per-capita net national income during 2019-20 is estimated to be Rs 1,35,050 showing a rise of 6.8% as compared to Rs 1,26,406 during 2018-19 with the growth rate of 10%, according to the annual national income and GDP 2019-20 data released by the Ministry of Statistics and Programme Implementation (MoSPI).

**Equity Markets:** Key benchmark indices endured a volatile session and ended with small losses on Wednesday. Sentiment was fragile after Iran fired more than a dozen missiles at two US military targets inside Iraq in response to the United States' killing of senior Iranian military commander Qassem Soleimani last week. The barometer BSE S&P Sensex fell 51.73 points or 0.13% to 40,817.74. The index fell 392.92 points, or 0.96% at the day's low of 40,476.55 in morning trade. The Nifty 50 index fell 27.60 points or 0.23% to 12,025.35. The index fell 123.35 points, or 1.02% at the day's low of 11,929.60 in morning trade.

**Corporate News:** Bharti Airtel said the company will launch a qualified institutional placement worth \$ 2 billion at an indicative issue floor price of Rs 452.09 per share and a separate fund raising exercise through issue of foreign currency convertible bonds of up to \$ 1 billion. State Bank of India (SBI) announced Residential Builder Finance with Buyer Guarantee (RBBG) to safeguard home buyers financially by issuing guarantee for completion of projects to customers availing SBI Home Loans. Now, customers will be able to secure their investment in the ongoing home projects financed by the bank itself. RBBG will focus on affordable housing segment with home price of upto Rs 2.50 crores in seven Indian geographies initially. Sunteck Realty and State Bank of India (SBI) entered into a Memorandum of Understanding towards boosting the residential housing sector under the Bank's "Sapna Aapka - Bharosa SBI Ka" scheme with Bank Guarantee to Home Buyers under the Builder Finance scheme.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(85.4)	59.3	40.7
MF(INR cr)	80.3	57.2	271.4

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,356	32,469	37,176
F&O(INR cr)	1,785,939	1,648,271	1,360,715

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.5	13.5	15.0
NSE VIX	15.6	13.5	16.5

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,374	(0.1) %	3.5 %	Energy	15,665	(0.8) %	(5.2) %
IT	15,953	0.4 %	0.7 %	Pharma	7,996	(0.5) %	(14.7) %
Metals	2,767	(0.7) %	(10.8) %	Finance	14,307	(0.1) %	14.5 %
Auto	7,943	(0.7) %	(5.6) %	PSU	2,402	(0.6) %	(29.0) %
FMCG	29,893	0.1 %	(1.0) %	Real Estate	297	(0.3) %	11.2 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Vodafone I	7	8.3 %	(63.4) %	NMDC	122	(4.9) %	15.6 %
L&T Fin.Ho	120	3.4 %	(21.0) %	Eicher Mot	19,892	(4.4) %	(0.8) %
Bharti Air	459	3.1 %	46.6 %	Coal India	200	(2.7) %	(15.3) %
Oracle Fin	2,748	2.9 %	(19.0) %	New India	145	(2.4) %	(23.4) %
TCS	2,255	2.2 %	11.0 %	Larsen & T	1,292	(2.2) %	(8.5) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Trade Balance (NOV)	09-01-2020	6:00	AUD	-	-
Housing Starts (DEC)	09-01-2020	18:45	CAD	-	-
Building Permits (MoM) (NOV)	09-01-2020	19:00	CAD	-	(0.015)
Preliminary data on SNB annual result	09-01-2020	11:55	CHF	-	-
Retail Sales Real (YoY) (NOV)	09-01-2020	13:00	CHF	-	0.007
Foreign Currency Reserves (DEC)	09-01-2020	13:30	CHF	-	-
Consumer Price Index (YoY) (DEC)	09-01-2020	7:00	CNY	-	0.045
German Industrial Production n.s.a. and w.d.a. (YoY) (NOV)	09-01-2020	12:30	EUR	-	(0.053)
Euro-Zone Unemployment Rate (NOV)	09-01-2020	15:30	EUR	-	0.075
BOE Governor Carney Speaks in London	09-01-2020	15:00	GBP	-	-
BRC Sales Like-For-Like (YoY) (DEC)	09-01-2020	5:31	GBP	-	(0.049)
Foreign Buying Japan Bonds (JAN 3)	09-01-2020	5:20	JPY	-	-
Tokyo Avg Office Vacancies (DEC)	09-01-2020	7:30	JPY	-	1.56
CPI (YoY) (DEC)	09-01-2020	17:30	MXN	-	0.0297
ANZ Truckometer Heavy (MoM) (DEC)	09-01-2020	2:30	NZD	-	(0.015)
ANZ Commodity Price (DEC)	09-01-2020	5:30	NZD	-	0.043
Consumer Credit (NOV)	09-01-2020	1:30	USD	-	-
Fed's Clarida Discusses Economy, Monetary Policy in New York	09-01-2020	18:30	USD	-	-
EIA Natural Gas Storage Change (JAN 3)	09-01-2020	21:00	USD	-	(58)
Fed's Williams Speaks at BoE in London	09-01-2020	22:00	USD	-	-
U.S. to Sell USD16 Bln 30-Year Bonds	09-01-2020	23:30	USD	-	-
Fed's Evans Speaks on Economic Outlook	09-01-2020	23:50	USD	-	-

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