



10 Feb.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,098	(0.3) %	3.7 %
BSE SENSEX	41,142	(0.4) %	5.8 %
CNX BANK	31,202	(0.3) %	2.9 %
CNX MIDCAP	18,368	0.7 %	0.2 %
CNX SMALLCAP	6,247	0.1 %	(7.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,103	(0.9) %	2.0 %
S&P 500	3,328	(0.5) %	3.0 %
FTSE 100	7,467	(0.5) %	(1.8) %
HANG SENG	27,404	(0.3) %	(4.0) %
NIKKEI	23,828	(0.2) %	2.7 %
SHANGHAI COMPOSITE	2,876	0.3 %	(6.8) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.12	0.0 %	(0.1) %
EUR/USD	1.10	(0.3) %	(2.0) %
GBP/USD	1.30	(0.4) %	(1.7) %
USD/JPY	109.92	0.3 %	1.2 %
USD/AUD	1.48	0.0 %	4.0 %
USD/SGD	1.39	0.4 %	2.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	3.6 %	(14.8) %
Gold(INR/10g)	40,556	0.4 %	4.0 %
Gold Comex(USD/oz)	1,570	0.1 %	1.8 %
SILVER(INR/1Kg)	46,205	0.1 %	0.3 %
Aluminium(USD/MT)	1,723	1.7 %	(2.8) %
Copper(USD/MT)	5,621	(0.6) %	(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	1.6	(0.1) %	(0.3) %

**Global Economy:** The US Labor Department on Friday said non-farm employment jumped by 225,000 jobs in January following a revised increase of 147,000 jobs in December. The stronger than expected job growth reflected Notable job in construction, healthcare, and transportation and warehousing. Despite the stronger job growth, the unemployment rate inched up to 3.6% in January from 3.5% in December. Germany's industrial production declined 3.5% on month in December, in contrast to a revised 1.2% rise in November, Destatis reported Friday. On a yearly basis, industrial production plunged 6.8%, faster than the 2.5% drop in November. UK house prices increased 0.4% on a monthly basis in January, much slower than the 1.8% increase posted in December and 1.2% rise in November, data from the Lloyds Bank subsidiary Halifax and IHS Markit showed on Friday. Japan's leading index rose in December after falling in the previous month, preliminary data from the Cabinet Office showed on Friday. The leading index, which measures the future economic activity, rose to 91.6 in December from 90.8 in November. Russia's central bank lowered its key interest rate for the sixth consecutive meeting and signaled more easing to counter the slowdown in inflation. The Board of Directors, led by Governor Elvira Nabiullina, decided to cut the key rate by 25 basis points to 6%, the Bank of Russia said in a statement on Friday.

**Global Equities:** US stocks eased on corrective selling. DOW fell around 0.90%. Worries over the novel coronavirus stayed in place.

**Indian Economy:** Finance Minister Nirmala Sitharaman said the Union Budget has laid the foundation of increasing consumption while ensuring that the government's investment is deployed to build infrastructure leading to a \$5 trillion economy by 2024-25.

**Equity Markets:** Key benchmark indices corrected on Friday, following four sessions of broad gains. The Nifty slipped below 12,100 mark. Negative global cues spoiled investor sentiment. The barometer BSE S&P Sensex fell 164.18 points or 0.40% to 41,141.85, as per the provisional closing data. The Nifty 50 index lost 51.55 points or 0.42% to 12,086.40, as per the provisional closing data.

**Corporate News:** IT counters could be in focus on a sharp fall in Indian Rupee. Indian Rupee slipped sharply as the US dollar surged in global markets. INR dropped by 22 paise to close at 71.40 per US dollar. NTPC Q3 net profit rose 25.6% to Rs 2,995.1 crore versus Rs 2,385 crore, though revenue edged down 2.6% to Rs 23,496 crore versus Rs 24,120.4 crore, YoY. Tata Steel recorded Q3 consolidated loss of Rs 1,228 crore vs profit of Rs 1,753.1 crore. The company's revenue dipped 8.6% to Rs 35,520.4 crore YoY. Britannia Q3 profit jumped 23.3% to Rs 369.9 crore while revenue rose 4.9% to Rs 2,982.7 crore YoY. KEC International Q3 profit jumped 30.7% to Rs 144.9 crore while revenue rose 16.1% to Rs 3,073.1 cr YoY. Godfrey Phillips Q3 net profit soared 39.1% to Rs 114 crore versus Rs 81.9 crore while revenue was up 14.3% at Rs 761.3 crore versus Rs 666.8 crore, YoY.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(14.2)	112.1	44.0
MF(INR cr)	69.7	64.1	248.5

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	3,885	31,075	36,985
F&O(INR cr)	806,710	1,786,472	1,398,750

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.5	0	0
NSE VIX	13.8	0	0

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,202	(0.3) %	2.9 %	Energy	15,190	(0.3) %	(8.1) %
IT	16,470	0.6 %	4.0 %	Pharma	8,342	1.4 %	(11.0) %
Metals	2,711	0.8 %	(12.6) %	Finance	14,502	(0.3) %	16.0 %
Auto	8,065	(1.0) %	(4.2) %	PSU	2,313	(0.1) %	(31.7) %
FMCG	30,810	0.2 %	2.0 %	Real Estate	320	(1.8) %	19.9 %

### 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>
Aurobindo	547	7.1 %	(31.0) %	DLF	236	(4.3) %	20.6 %
General In	272	6.4 %	10.5 %	Motherson	132	(3.3) %	(13.9) %
Zee Entert	250	5.9 %	(42.1) %	Eicher Mot	19,736	(3.2) %	(1.6) %
Biocon	309	4.5 %	(0.3) %	Tata Motor	174	(2.9) %	(7.3) %
Bandhan Ba	443	4.1 %	(16.5) %	IndusInd B	1,299	(2.7) %	(25.5) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Housing Starts (JAN)	10-02-2020	18:45	CAD	-	-
Building Permits (MoM) (DEC)	10-02-2020	19:00	CAD	-	(0.024)
Unemployment Rate (JAN)	10-02-2020	12:15	CHF	-	0.025
CPI EU Harmonized (YoY) (JAN)	10-02-2020	13:00	CHF	-	(0.001)
Domestic Sight Deposits CHF (FEB 7)	10-02-2020	14:30	CHF	-	-
Consumer Price Index (YoY) (JAN)	10-02-2020	7:00	CNY	-	0.045
Euro-Zone Sentix Investor Confidence (FEB)	10-02-2020	15:00	EUR	-	7.6
Bankruptcies (YoY) (JAN)	10-02-2020	10:00	JPY	-	0.1318
Eco Watchers Survey Current (JAN)	10-02-2020	10:30	JPY	-	39.8
Bank Lending Ex-Trusts (YoY) (JAN)	10-02-2020	5:20	JPY	-	0.019
BOJ Outright Bond Purchase 10~25 Year	10-02-2020	6:40	JPY	-	-
U.S. to Sell 13-Week Bills	10-02-2020	22:00	USD	-	-

..... End of Report .....