



11 Feb.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,032	(0.6) %	3.1 %
BSE SENSEX	40,980	(0.4) %	5.4 %
CNX BANK	31,058	(0.5) %	2.4 %
CNX MIDCAP	18,191	(1.0) %	(0.8) %
CNX SMALLCAP	6,178	(1.1) %	(8.3) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,277	0.6 %	2.6 %
S&P 500	3,352	0.7 %	3.8 %
FTSE 100	7,447	(0.3) %	(2.1) %
HANG SENG	27,241	(0.6) %	(4.6) %
NIKKEI	23,686	(0.6) %	2.1 %
SHANGHAI COMPOSITE	2,890	0.5 %	(6.3) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.27	0.2 %	0.1 %
EUR/USD	1.09	(0.8) %	(2.5) %
GBP/USD	1.29	(0.8) %	(2.1) %
USD/JPY	109.76	0.1 %	1.0 %
USD/AUD	1.50	0.9 %	4.9 %
USD/SGD	1.39	0.7 %	3.2 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	3.6 %	(14.8) %
Gold(INR/10g)	40,589	0.1 %	4.1 %
Gold Comex(USD/oz)	1,570	0.1 %	1.8 %
SILVER(INR/1Kg)	46,205	0.0 %	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:** China consumer prices were up 5.4% on year in January, the National Bureau of Statistics said on Monday, following the 4.5% gain in December. The bureau also said that producer prices sank 0.5% on year following the 0.5% decline in the previous month. Eurozone investor sentiment eased in February, after rising in the previous three months, results of a closely watched survey showed on Monday. The investor confidence index dropped to 5.2 from 7.6 in December, the behavioral research institute Sentix said. The current situation index of the survey dropped to 4.0 from 5.5 and the expectations measure also eased to 6.5 from 9.8. Japan's Eco Watchers Survey, a measure of the public assessment of the Japanese economy improved for the third month in a row in January, survey data from the Cabinet Office showed on Monday. The current conditions index of the Economy Watchers' Survey, which measures the current situation of the economy, increased to 41.9 in January from 39.7 in December. Japan reported a current account surplus of 524.0 billion yen in December, the Ministry of Finance said on Monday - up 12.8% on year. This followed the 1,436.8 billion yen surplus in November.

**Global Equities:** US equities recovered from an initial drop and saw good buying. The Nasdaq and the S&P 500 hit new record closing highs.

**Indian Economy:** The Society of Indian Automobile Manufacturers (SIAM) data showed that the domestic automobile industry produced a total 2,151,544 vehicles including Passenger Vehicles, Commercial Vehicles, Three Wheelers, Two Wheelers and Quadricycle in January 2020, as against 2,405,883 in January 2019. This accounted for a drop of 10.57%. Domestic Passenger Vehicles sales were 262,714 units in January 2020, compared to 280,091 units in January 2019, down 6.20%. Commercial Vehicles sales was 75,289 units in January 2020 compared to 87,591 units in January 2019, also recording a sharp drop of 14%. Three-wheeler sales was 60,903 units in January 2020 compared to 54,043 units in January 2019 while Two-wheeler sales was 1,341,005 units in January 2020, compared to 1,597,528 units in January 2019. Domestic automobile industry produced a total 22,887,954 vehicles including Passenger Vehicles, Commercial Vehicles, Three Wheelers, Two Wheelers and Quadricycle in April-January 2020 as against 26,259,653 in April January 2019, sliding by almost 13%. Passenger Vehicles sales was 2,380,699 units in April-January 2020, compared to 2,813,285 units in April-January 2019.

**Equity Markets:** Key equity market benchmarks recovered from the day's low and ended with minor cuts for second straight session on Monday. The Nifty managed to close above the crucial 12,000 mark. Sentiment was weak amid ongoing concerns around the coronavirus outbreak in China. The barometer BSE S&P Sensex fell 162.23 points or 0.39% to 40,979.62, as per the provisional closing data. The Nifty 50 index lost 66.85 points or 0.55% to 12,031.50, as per the provisional closing data.

**Corporate News:** Cipla said its wholly owned subsidiary Cipla Medpro South Africa and South Africa's third largest pharmaceutical company in the private sector, concluded an exclusive agreement securing originator and authorised generic brands of an atypical anti-psychotic drug, Quetiapine. Infosys announced a definitive agreement to acquire Simplus, one of the fastest growing Salesforce Platinum Partners in the USA and Australia. Simplus is a recognized leader and advisor in cloud consulting, implementation, data integration, change management and training services for Salesforce Quote-to-Cash applications. Petronet LNG reported 15.76% rise in consolidated net profit to Rs 679.22 crore on 11.85% fall in total income to Rs 8998.43 crore in Q3 December 2019 over Q3 December 2018.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	1,395.7	368.8	50.3
MF(INR cr)	(207.5)	18.9	246.4

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	36,199	31,807	36,981
F&O(INR cr)	919,138	1,662,567	1,396,498

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.5	0	0
NSE VIX	14.2	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	31,058	(0.5) %	2.4 %	Energy	15,026	(1.1) %	(9.1) %
IT	16,432	(0.2) %	3.7 %	Pharma	8,261	(1.0) %	(11.9) %
Metals	2,629	(3.0) %	(15.3) %	Finance	14,497	(0.0) %	16.0 %
Auto	7,861	(2.5) %	(6.6) %	PSU	2,290	(1.0) %	(32.3) %
FMCG	30,528	(0.9) %	1.1 %	Real Estate	317	(1.0) %	18.7 %

## 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>
Avenue Sup	2,484	8.6 %	66.4 %	Zee Entert	230	(7.7) %	(46.6) %
UPL	574	5.7 %	(7.8) %	M & M	528	(7.2) %	(20.0) %
Bandhan Ba	457	3.3 %	(13.7) %	Tata Steel	444	(5.8) %	(17.1) %
Berger Pai	582	2.0 %	76.4 %	Motherson	125	(5.7) %	(18.8) %
United Spi	688	1.7 %	25.2 %	Grasim Ind	758	(3.8) %	(11.6) %

## 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 (FEB 9)	11-02-2020	4:00	AUD	-	108.5
Home Loans Value (MoM) (DEC)	11-02-2020	6:00	AUD	-	0.018
ECB President Lagarde Speaks at Strasbourg European Parliament	11-02-2020	19:30	EUR	-	-
ECB Executive Board Member Schnabel Speaks in Karlsruhe	11-02-2020	22:00	EUR	-	-
ECB Board Member Lane Speaks in Berlin	11-02-2020	22:30	EUR	-	-
Gross Domestic Product (YoY) (4Q P)	11-02-2020	15:00	GBP	-	0.011
BOE Governor Carney Speaks Before Lords Committee	11-02-2020	21:05	GBP	-	-
BRC Sales Like-For-Like (YoY) (JAN)	11-02-2020	5:31	GBP	-	0.017
Industrial Production NSA (YoY) (DEC)	11-02-2020	17:30	MXN	-	(0.021)
N.Z. Government 6-Month Financial Statements	11-02-2020	2:30	NZD	-	-
Fed's Daly Speaks in Dublin	11-02-2020	0:15	USD	-	-
Fed's Harker Discusses Economic Outlook	11-02-2020	1:45	USD	-	-
Powell to Speak Before House Financial Services Panel	11-02-2020	20:30	USD	-	-
Fed's Quarles Speaks on Bank Supervision	11-02-2020	22:45	USD	-	-
U.S. to Sell USD38 Bln 3-Year Notes	11-02-2020	23:30	USD	-	-

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