



12 Jan.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,485	1.0 %	75.5 %
BSE SENSEX	49,269	1.0 %	74.3 %
CNX BANK	31,999	(0.3) %	75.7 %
CNX MIDCAP	22,140	(0.2) %	93.0 %
CNX SMALLCAP	7,440	(0.0) %	110.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,009	(0.3) %	1.3 %
S&P 500	3,800	(0.7) %	1.2 %
FTSE 100	6,798	(1.1) %	3.4 %
HANG SENG	27,908	0.1 %	1.6 %
NIKKEI	28,139	2.4 %	3.2 %
SHANGHAI COMPOSITE	3,532	(1.1) %	0.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.25	0.3 %	0.4 %
EUR/USD	1.22	(0.8) %	(0.4) %
GBP/USD	1.36	(0.4) %	(0.7) %
USD/JPY	103.98	1.0 %	0.8 %
USD/AUD	1.29	0.4 %	(0.6) %
USD/SGD	1.33	0.6 %	0.3 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.0 %	(21.0) %
Gold(INR/10g)	49,344	(1.8) %	(3.3) %
Gold Comex(USD/oz)	1,895	0.2 %	22.8 %
SILVER(INR/1Kg)	64,727	(4.1) %	(6.0) %
Aluminium(USD/MT)	2,049	1.0 %	15.6 %
Copper(USD/MT)	7,964	0.9 %	29.2 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	0.9	0.0 %	(1.0) %

**Global Economy:** The US interest rates could rise sooner than forecast as the economy recovers more quickly than expected from the throes of the Covid-19 damage, Atlanta Federal Reserve President Raphael Bostic said Monday. Bostic said that he thinks the emergency measures the Fed has taken to combat the pandemic can start to be rolled back within the next two years if not sooner. Consumer prices in China were up 0.2% year-on-year in December, the National Bureau of Statistics said. On a monthly basis, inflation was up 0.7 % following the 0.6% decline in the previous month. The bureau also said that producer prices were down an annual 0.4% after dropping 1.5% a month earlier. Eurozone investor confidence rose to a positive level in January for the first time since early 2020 as investors became more confident about vaccination strategy, ignoring the current lockdowns, survey data from Sentix showed on Monday. The investor sentiment index rose to 1.3 in January from -2.7 in December. This was the first positive score since February 2020. At -26.5, the current situation index advanced to an 11-month high from -30.3 in December.

**Global Equities:** The Dow edged up after witnessing tepid start Monday as gains in energy and healthcare stocks supported the sentiments.

**Indian Economy:** Reserve Bank released the 22nd issue of the Financial Stability Report (FSR). The bank noted that in the initial phase of the COVID-19 pandemic, policy actions were geared towards restoring normal functioning and mitigating stress; the focus is now being oriented towards supporting the recovery and preserving the solvency of businesses and households. Positive news on vaccine development has underpinned optimism on the outlook, though it is marred by second wave of the virus including more virulent strains. Bank credit growth has remained subdued, with the moderation being broad-based across bank groups. Macro stress tests incorporating the first advance estimates of gross domestic product (GDP) for 2020-21 released on January 7, 2021 indicate that the GNPA ratio of all SCBs may increase from 7.5% in September 2020 to 13.5% by September 2021 under the baseline scenario; the ratio may escalate to 14.8% under a severe stress scenario.

**Equity Markets:** Domestic equity benchmarks jumped to end near the day's high on Monday. IT, auto, FMCG and pharma shares rallied while metals and PSU banks corrected. The Sensex hit a record high of 49,303.79 and the Nifty hit a record high of 14,498.20 in late trade. Positive Asian cues and robust FII inflows boosted sentiment. The broader market underperformed the benchmarks. The S&P BSE Mid-Cap index fell 0.08%. The S&P BSE Small-Cap index lost 0.17%.

**Corporate News:** GAIL's board meeting is scheduled on January 15 to consider the proposal of buyback of shares. Tata Motors will be in focus as Jaguar Land Rover's retail sales fell 9% YoY to 1,28,469 units in the October-December period but up by 13.1% on a QoQ basis. Metal stocks could correct following a more than 3% correction in COMEX Copper yesterday.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	819.7	232.5	164.2
MF(INR cr)	(1,156.3)	(1,490.2)	(493.3)

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	77,187	63,306	58,672
F&O(INR cr)	2,116,223	2,862,528	2,115,393

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.6	21.9	29.2
NSE VIX	22.4	20.7	26.2

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,999	(0.3) %	75.7 %	Energy	17,109	(0.8) %	58.8 %
IT	27,028	3.3 %	124.4 %	Pharma	13,412	1.1 %	90.9 %
Metals	3,494	(1.0) %	124.9 %	Finance	15,605	0.6 %	74.5 %
Auto	9,996	2.6 %	114.6 %	PSU	1,803	(1.5) %	40.5 %
FMCG	34,681	1.2 %	31.6 %	Real Estate	330	0.6 %	91.5 %

### 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>
Tata Motor	221	11.4 %	224.7 %	Adani Gree	968	(4.6) %	533.3 %
HCL Techno	1,055	6.1 %	155.1 %	Hindustan	292	(3.9) %	82.1 %
Infosys	1,376	4.9 %	128.3 %	Indus Towe	262	(3.0) %	69.1 %
Wipro	447	3.9 %	135.8 %	Bandhan Ba	408	(2.6) %	109.5 %
L & T Info	4,245	3.7 %	204.9 %	Tata Steel	696	(2.5) %	161.2 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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