



12 Feb.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,108	0.6 %	3.8 %
BSE SENSEX	41,216	0.6 %	6.0 %
CNX BANK	31,301	0.8 %	3.2 %
CNX MIDCAP	18,206	0.1 %	(0.7) %
CNX SMALLCAP	6,191	0.2 %	(8.1) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,276	0.0 %	2.6 %
S&P 500	3,358	0.2 %	3.9 %
FTSE 100	7,499	0.7 %	(1.4) %
HANG SENG	27,584	1.3 %	(3.4) %
NIKKEI	23,686	(0.6) %	2.1 %
SHANGHAI COMPOSITE	2,902	0.4 %	(5.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.18	0.1 %	(0.0) %
EUR/USD	1.09	(0.7) %	(2.7) %
GBP/USD	1.29	(0.2) %	(1.9) %
USD/JPY	109.84	(0.1) %	1.1 %
USD/AUD	1.49	0.5 %	4.5 %
USD/SGD	1.39	0.2 %	3.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	4.4 %	(14.8) %
Gold(INR/10g)	40,468	(0.3) %	3.8 %
Gold Comex(USD/oz)	1,565	(0.3) %	1.5 %
SILVER(INR/1Kg)	45,961	(0.5) %	(0.2) %
Aluminium(USD/MT)	1,723	2.0 %	(2.8) %
Copper(USD/MT)	5,621	(1.3) %	(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: Federal Reserve Chairman Jerome Powell said the central bank is closely monitoring the emergence of the coronavirus in testimony before the House Financial Services Committee on Tuesday. UK gross domestic product remained unchanged on quarter, after expanding 0.5% in the third quarter, data from the Office for National Statistics showed Tuesday. However, in 2019, the economy grew at a slightly faster pace of 1.4% after rising 1.3% in 2018. Breaking this down by sector, services grew 1.8% in 2019, production fell 1.3% and construction grew 2.5%. In December, the economy recovered driven by growth in services. UK goods trade balance showed a surplus for December, defying expectations for a bigger deficit, figures from the Office for National Statistics showed on Tuesday. The visible trade balance swung to a surplus of GBP 845 million from a GBP 4.947 deficit in the previous month. According to a latest update from the International Monetary Fund (IMF), Japan's population is rapidly aging and shrinking, and doing so unevenly across regions. Australia's home loans rose in December, data from the Australian Bureau of Statistics showed on Tuesday. The new loan commitments for housing rose a seasonally adjusted 4.4% month-on-month in December. On an annual basis, loans increased 14%. Australia's business confidence index edged up to -1 in January from -2 in December, which was the weakest reading since mid-2013.

Global Equities: US stocks ended mixed. Asian stocks edged up as traders eyed the possibility of China unveiling an economic stimulus.

Indian Economy: According to RBI, the total cost of projects sanctioned/contracted through various channels of financing altogether increased to Rs 2,53,705 crore in 2018-19 as against Rs 2,07,673 crore in 2017-18. The increase in the total cost of projects sanctioned/contracted by major channels of financing continued in H1:2019-20 over H1:2018-19. The planned capex based on the pipeline projects (already sanctioned in preceding years) is estimated to be higher at Rs 1,20,157 crore in 2019-20 over the previous year (Rs 84,602 crore). Bad loans fall to Rs 7.27 lakh crore at the end of September 2019, down from Rs 8.96 lakh crore at the end of March 2018. Finance Minister Nirmala Sitharaman said public sector banks' (PSBs) bad loans came down to Rs 7.27 lakh crore at the end of September 2019, on a host of measures taken by the government to improve the financial health of the banks in the country.

Equity Markets: After two consecutive days of losses, the domestic stock market advanced on Tuesday, led by positive global cues. The Nifty, however, failed to close above its 50-day simple moving average placed at 12,120.39. Global shares edged higher as some Chinese factories slowly resumed operations amid the national fight against the novel coronavirus outbreak. The barometer BSE S&P Sensex rose 236.52 points or 0.58% to 41,216.14. The Nifty 50 index added 76.40 points or 0.63% to 12,107.90.

Corporate News: Hexaware Technologies said its net profit increased 35.9% to Rs 167.8 crore in December 2019 quarter from Rs 123.4 crore in the year-ago period. Its revenue increased 22.1% to Rs 1,528.8 crore in the quarter under review as compared with Rs 1,252.4 crore in the year-ago period. Competition Commission of India (CCI) approved formation of a joint venture between Mahindra & Mahindra and Ford Motor and the transfer of the automotive business of Ford India to the joint venture. State-owned engineering firm BHEL on Tuesday reported 17% decline in consolidated net profit at Rs 161.81 crore for December quarter 2019, mainly due to lower revenue. Total income in the third quarter of this fiscal declined to Rs 5,827.74 crore from Rs 7,563.51 crore in the year-ago period.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(70.5)	295.6	49.7
MF(INR cr)	(419.4)	(43.8)	243.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	37,509	42,975	37,375
F&O(INR cr)	1,140,799	1,597,346	1,395,303

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.2	0	0
NSE VIX	13.9	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	31,301	0.8 %	3.2 %	Energy	15,233	1.4 %	(7.9) %
IT	16,452	0.1 %	3.9 %	Pharma	8,325	0.8 %	(11.2) %
Metals	2,652	0.9 %	(14.5) %	Finance	14,590	0.6 %	16.7 %
Auto	7,892	0.4 %	(6.2) %	PSU	2,293	0.1 %	(32.2) %
FMCG	30,415	(0.4) %	0.7 %	Real Estate	318	0.2 %	18.9 %

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>
Indiabulls	345	6.8 %	(59.3) %	General In	236	(11.5) %	(4.2) %
GAIL (Indi)	129	6.0 %	(27.2) %	New India	145	(4.4) %	(23.4) %
JSW Steel	289	3.9 %	(1.2) %	Vodafone I	5	(4.0) %	(72.7) %
Bharti Inf	249	3.8 %	(20.8) %	Avenue Sup	2,395	(3.6) %	60.4 %
NTPC	117	3.0 %	(13.5) %	Petronet L	264	(2.6) %	6.5 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
RBA's Heath Gives Speech in Sydney	12-02-2020	2:20	AUD	-	-
ECB Board Member Lane Speaks in Dublin	12-02-2020	15:20	EUR	-	-
Euro-Zone Industrial Production w.d.a. (YoY) (DEC)	12-02-2020	15:30	EUR	-	(0.015)
Machine Tool Orders (YoY) (JAN P)	12-02-2020	11:30	JPY	-	(0.335)
Japan Money Stock M2+CD (YoY) (JAN)	12-02-2020	5:20	JPY	-	0.027
NZ Finance Min at Select Committee on HYEUFU	12-02-2020	1:00	NZD	-	-
Card Spending Retail (MoM) (JAN)	12-02-2020	3:15	NZD	-	(0.008)
RBNZ OCR decision - mps	12-02-2020	6:30	NZD	-	-
RBNZ Governor News Conference After OCR Decision	12-02-2020	7:30	NZD	-	-
Fed's Bullard Discusses Economy and Monetary Policy	12-02-2020	0:00	USD	-	-
Monthly Budget Statement (JAN)	12-02-2020	0:30	USD	-	-
Fed's Kashkari Speaks in Kalispell, Montana	12-02-2020	0:45	USD	-	-
MBA Mortgage Applications (FEB 7)	12-02-2020	17:30	USD	-	0.05
Fed's Harker Discusses Economic Outlook	12-02-2020	19:00	USD	-	-
Powell Testifies Before Senate Banking Panel	12-02-2020	20:30	USD	-	-
DOE U.S. Crude Oil Inventories (FEB 7)	12-02-2020	21:00	USD	-	-
U.S. to Sell USD27 Bln 10-Year Notes	12-02-2020	23:30	USD	-	-

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