



13 Jan.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,257	0.3 %	5.0 %
BSE SENSEX	41,600	0.4 %	7.0 %
CNX BANK	32,097	0.0 %	5.8 %
CNX MIDCAP	17,386	0.4 %	(5.2) %
CNX SMALLCAP	6,057	0.8 %	(10.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,824	(0.5) %	1.0 %
S&P 500	3,265	(0.3) %	1.1 %
FTSE 100	7,588	(0.1) %	(0.2) %
HANG SENG	28,638	0.3 %	0.3 %
NIKKEI	23,851	0.5 %	2.8 %
SHANGHAI COMPOSITE	3,092	(0.1) %	0.2 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.21	(0.5) %	0.0 %
EUR/USD	1.11	(0.2) %	(0.9) %
GBP/USD	1.31	(0.3) %	(0.8) %
USD/JPY	109.40	0.7 %	0.7 %
USD/AUD	1.46	0.1 %	2.2 %
USD/SGD	1.35	0.0 %	0.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	60	0.0 %	(2.6) %
Gold(INR/10g)	39,607	(0.2) %	1.6 %
Gold Comex(USD/oz)	1,563	0.9 %	1.3 %
SILVER(INR/1Kg)	46,155	(0.4) %	0.2 %
Aluminium(USD/MT)	1,772	0.0 %	(0.0) %
Copper(USD/MT)	6,157	0.0 %	(0.1) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.8	(0.0) %	(0.1) %

**Global Economy:** After reporting a substantial increase in US employment in the previous month, the Labor Department released a report on Friday showing the pace of job growth slowed. The report said non-farm payroll employment climbed by 145,000 jobs in December after spiking by a revised 256,000 in November. Meanwhile, the report said the unemployment rate came in at 3.5% in December, unchanged from the previous month. Japan's leading index fell to the lowest level in ten years in November, data from the Cabinet Office showed on Friday. The leading index, which measures the future economic activity, fell to 90.9 in November from 91.6 in October. The Bank of France on Friday retained its growth forecast for the fourth quarter. According to the monthly survey, the economy is set to grow 0.2% in the fourth quarter, unchanged from the previous estimate. This was slower than the 0.3% growth posted in the third quarter.

**Global Equities:** DOW corrected on profit selling in last session. The US is planning to announce a new forum for economic dialogue with China.

**Indian Economy:** India's industrial production (base year 2011-12=100) rebounded 1.8% in November 2019, while snapping consistent decline for last three straight months. As per the revised data for industrial production of October 2019, the pace of decline in industrial production is raised to 4.0% compared with 3.8% reported provisionally. The domestic automobile industry produced a total 20,736,410 vehicles including Passenger Vehicles, Commercial Vehicles, Three Wheelers, Two Wheelers and Quadricycle in April-December 2019 as against 23,853,770 in April-December 2018, registering a de-growth (-) 13.07% over the same period last year, data from Society Of Indian Automobile Manufacturers (SIAM) showed. The sale of Passenger Vehicles declined by (-) 16.40% in April-December 2019 over the same period last year.

**Equity Markets:** Key domestic indices ended the volatile trading session with modest gains on Friday. The market sentiment was upbeat amid positive global cues. The Nifty pared gains after hitting a record high of 12,311.20 in early afternoon trade. The barometer BSE S&P Sensex rose 147.37 points or 0.36% to 41,599.72. The Nifty 50 index gained 40.90 points or 0.33% to 12,256.80. In the broader market, the BSE Mid-Cap index rose 0.40% and the BSE Small-Cap index rose 0.42%.

**Corporate News:** Infosys said its Q3FY20 Profit grew 10.9% and 2% on the revenue front in the quarter ended December 2019. Dollar revenue, as well as constant currency growth for the quarter, stood at 1% each compared to the same period last year. Avenue Supermarts said its Q3 FY20 standalone net profit grew 53.3% at Rs 394.3 crore against Rs 257.1 crore YoY. Standalone revenue went up 23.9% at Rs 6,751.9 crore against Rs 5,450.9 crore YoY. Tata Steel said its Netherland arm announced successful refinancing of Euro1.75 billion of European debt. Torrent Power said CRISIL upgraded its long-term rating NCDs & Bank Facilities to AA from AA-.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	21.9	38.6	40.2
MF(INR cr)	1,059.0	271.1	277.1

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	38,776	34,039	37,193
F&O(INR cr)	1,043,298	1,777,853	1,369,153

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.6	13.2	15.0
NSE VIX	14.1	13.6	16.5

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,097	0.0 %	5.8 %	Energy	15,940	0.3 %	(3.6) %
IT	15,960	0.2 %	0.8 %	Pharma	8,059	0.3 %	(14.0) %
Metals	2,841	1.2 %	(8.4) %	Finance	14,610	0.1 %	16.9 %
Auto	8,226	0.9 %	(2.2) %	PSU	2,461	0.1 %	(27.3) %
FMCG	30,370	0.8 %	0.6 %	Real Estate	311	1.8 %	16.3 %

## 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>
Oracle Fin	2,855	3.8 %	(15.8) %	Yes Bank	45	(5.4) %	(83.8) %
Coal India	205	3.7 %	(13.2) %	Zee Entert	263	(3.3) %	(39.1) %
Hind.Zinc	219	2.7 %	(22.8) %	Indiabulls	314	(2.7) %	(62.9) %
DLF	244	2.5 %	24.9 %	Vodafone I	6	(2.4) %	(65.6) %
Shree Ceme	23,345	2.3 %	24.2 %	Piramal En	1,448	(1.9) %	(44.9) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
TD Securities Inflation (YoY) (DEC)	13-01-2020	5:30	AUD	-	0.015
Bank of Canda Senior Loan Officer Survey (4Q)	13-01-2020	21:00	CAD	-	1.9
Domestic Sight Deposits CHF (JAN 10)	13-01-2020	14:30	CHF	-	-
Construction Output (YoY) (NOV)	13-01-2020	15:00	GBP	-	(0.021)
U.S. to Sell 13-Week Bills	13-01-2020	22:00	USD	-	-

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