



13 Feb.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,201	0.8 %	4.6 %
BSE SENSEX	41,566	0.8 %	6.9 %
CNX BANK	31,493	0.6 %	3.8 %
CNX MIDCAP	18,169	(0.2) %	(0.9) %
CNX SMALLCAP	6,176	(0.2) %	(8.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,551	0.9 %	3.5 %
S&P 500	3,379	0.7 %	4.6 %
FTSE 100	7,534	0.5 %	(0.9) %
HANG SENG	27,824	0.9 %	(2.5) %
NIKKEI	23,861	0.7 %	2.8 %
SHANGHAI COMPOSITE	2,927	0.9 %	(5.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.18	(0.1) %	(0.0) %
EUR/USD	1.09	(0.3) %	(2.8) %
GBP/USD	1.30	0.4 %	(1.7) %
USD/JPY	109.97	0.2 %	1.2 %
USD/AUD	1.48	(0.7) %	4.1 %
USD/SGD	1.39	(0.2) %	3.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	0.7 %	(18.4) %
Gold(INR/10g)	40,467	(0.0) %	3.8 %
Gold Comex(USD/oz)	1,565	(0.3) %	1.5 %
SILVER(INR/1Kg)	45,644	(0.7) %	(0.9) %
Aluminium(USD/MT)	1,690	0.8 %	(4.7) %
Copper(USD/MT)	5,696	0.6 %	(7.6) %

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: DOW hit fresh highs after the US Federal Reserve Chairman Jerome Powell said Wednesday the central bank would fight the next economic downturn by buying large amounts of government debt to drive down long-term interest rates indicating use of quantitative easing. Chinese officials reported the lowest daily increase in coronavirus infection cases in nearly two weeks.

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)	302.9	296.7	50.9
MF(INR cr)	442.0	17.0	244.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	2,678	38,497	37,213
F&O(INR cr)	1,302,740	1,564,612	1,394,872

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.2	15.7	14.9
NSE VIX	13.6	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	31,493	0.6 %	3.8 %	Energy	15,234	0.0 %	(7.9) %
IT	16,538	0.5 %	4.4 %	Pharma	8,265	(0.7) %	(11.8) %
Metals	2,668	0.6 %	(14.0) %	Finance	14,685	0.7 %	17.5 %
Auto	7,934	0.5 %	(5.7) %	PSU	2,249	(1.9) %	(33.5) %
FMCG	30,986	1.9 %	2.6 %	Real Estate	315	(0.8) %	18.0 %

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>
Hind. Unil	2,260	5.0 %	33.7 %	Vodafone I	5	(7.2) %	(74.6) %
Godrej Con	642	4.3 %	(5.1) %	Siemens	1,424	(4.8) %	25.8 %
Interglobe	1,442	3.7 %	1.8 %	Yes Bank	35	(4.5) %	(87.2) %
Avenue Sup	2,482	3.7 %	66.3 %	H P C L	234	(2.7) %	(17.7) %
United Spi	692	3.1 %	26.0 %	L&T Fin.Ho	127	(2.6) %	(16.2) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Consumer Inflation Expectation (FEB)	13-02-2020	5:30	AUD	-	0.047
RBA Governor Lowe Participates in Panel	13-02-2020	5:45	AUD	-	-
ECB Board Member Panetta Attends Event in Rome	13-02-2020	0:30	EUR	-	-
German Consumer Price Index (YoY) (JAN F)	13-02-2020	12:30	EUR	-	0.017
ECB policy maker Pablo Hernandez de Cos speaks in Madrid	13-02-2020	14:00	EUR	-	-
European Commission Publishes Winter Forecasts	13-02-2020	15:30	EUR	-	-
ECB Board Member Lane Speaks in Dublin	13-02-2020	17:30	EUR	-	-
ECB Board Member Panetta Speaks in Rome	13-02-2020	22:30	EUR	-	-
RICS House Price Balance (JAN)	13-02-2020	5:31	GBP	-	(0.02)
Domestic Corporate Goods Price Index (MoM) (JAN)	13-02-2020	5:20	JPY	-	0.001
BOJ Outright Bond Purchase 1~3 Years	13-02-2020	6:40	JPY	-	-
RBNZ Governor at Parliament Select Committee on MPS	13-02-2020	0:40	NZD	-	-
Consumer Price Index (YoY) (JAN)	13-02-2020	19:00	USD	-	0.023
Senate Panel Holds Hearing for Fed Nominees Shelton, Waller	13-02-2020	20:30	USD	-	-
EIA Natural Gas Storage Change (FEB 7)	13-02-2020	21:00	USD	-	(137)
U.S. to Sell 4-Week Bills	13-02-2020	22:00	USD	-	-

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