



13 Dec.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,972	0.0 %	2.6 %
BSE SENSEX	40,582	0.4 %	4.7 %
CNX BANK	31,665	0.0 %	4.4 %
CNX MIDCAP	16,772	0.0 %	(8.5) %
CNX SMALLCAP	5,605	0.0 %	(16.8) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,132	0.8 %	20.6 %
S&P 500	3,169	0.9 %	26.4 %
FTSE 100	7,273	0.8 %	8.0 %
HANG SENG	26,994	1.3 %	7.4 %
NIKKEI	23,425	0.1 %	19.7 %
SHANGHAI COMPOSITE	2,916	(0.3) %	18.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.69	(0.4) %	1.8 %
EUR/USD	1.11	0.3 %	(3.1) %
GBP/USD	1.32	0.1 %	3.2 %
USD/JPY	108.69	0.1 %	(0.9) %
USD/AUD	1.46	(0.2) %	2.9 %
USD/SGD	1.36	(0.1) %	(0.4) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	(0.8) %	26.3 %
Gold(INR/10g)	37,763	0.4 %	19.8 %
Gold Comex(USD/oz)	1,464	(0.7) %	13.4 %
SILVER(INR/1Kg)	43,640	1.0 %	14.0 %
Aluminium(USD/MT)	1,755	0.2 %	(5.5) %
Copper(USD/MT)	6,097	0.2 %	4.4 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.0	0.2 %	(0.7) %

**Global Economy:** The US The Labor Department said its producer price index for final demand was flat in November after climbing by 0.4% in October. European Central Bank on Thursday kept its main deposit rate at negative 0.5%, a move that was anticipated by analysts. The ECB also kept its asset purchase program at 20 billion euros per month. Eurozone industrial production decreased for the second straight month, largely driven by weak capital goods output in October, data from Eurostat showed Thursday. Industrial output dropped 0.5% in October from September, when production was down 0.1%. Germany's inflation rate remained stable, as initially estimated, in November at its lowest level since early 2018, final data from the Federal Statistical Office showed on Thursday. The consumer price index climbed 1.1% year-on-year, the same rate as seen in October. UK house prices declined at the fastest pace since April as uncertainties from Brexit and general election weighed on the property market, survey data from the Royal Institution of Chartered Surveyors, or RICS, showed on Thursday. The house price balance fell to -12 in November from -5 in October. Switzerland's central bank maintained its negative interest rates and expressed willingness to intervene in the currency market as required. The Swiss National Bank retained its policy rate and interest on sight deposits at the SNB at -0.75% on Thursday. Total value of core machine orders in Japan was down a seasonally adjusted 6% on month in October, the Cabinet Office said on Thursday - coming in at 798.8 billion yen, following the 2.9% decline in September.

**Global Equities:** The US President Donald Trump tweeted on Thursday that the United States is very close to a trade deal with China. This pushed up the US stock markets with the Nasdaq and the S&P 500 hitting record closing highs.

**Indian Economy:** Consumer price inflation in November rose to 5.54% from 4.62% in October, highest since 2016. Elevated food prices contributed to the spike. Food price inflation (Rural and urban) climbed 10.01% in November. India's industrial output contracted for the second straight month, led by weakness across segments. The Index of Industrial Production contracted 3.8% over a year ago in October 2019. The Indian Railway (IR) has recorded 3.2% decline in its overall revenues to Rs 15060.33 crore in November 2019 over November 2018. The IR revenues had moved up 7.0% to Rs 15560.04 crore in November 2018. The passenger earnings increased 5.9% to Rs 4461.65 crore in November 2019, against 7.1% growth recorded in November 2018. However, the earnings from freight traffic, accounting for 64.4% of the total revenue, dipped 9.2% to Rs 9701.79 crore in November 2019. The other coaching revenue fell 4.5% to Rs 392.70 crore, while the revenue from sundry activities jumped 103.2% to Rs 504.19 crore in November 2019. The air passenger traffic of domestic airlines has increased at 11-month high pace and double digit pace of 11.2% to 129.47 lakh in November 2019 over 116.45 lakh in November 2018. The growth of domestic air passenger traffic has moved in to double digits after a period of 10 months.

**Equity Markets:** The local stocks ended with strong gains on Thursday, after multiple announcements by the Union Cabinet on Wednesday lifted investor sentiment. A rally in metal and financial shares pushed the Nifty above 11,950 mark. Global cues were positive after the US Federal Reserve kept interest rates unchanged.

**Corporate News:** Wipro said that it has been awarded a strategic multi-year cyber governance, cloud and infrastructure services transformation engagement by Olympus. Raymond said it has allotted 33,38,278 Equity Shares at a price of Rs 674 per Equity Share aggregating to approximately Rs 225 crore and 18,54,599 0.01% Compulsorily Convertible Preference Shares, each carrying a right to convert to one Equity Share per Preference Share, at a price of Rs 674 per Preference Share, aggregating to approximately Rs 125 crore, on preferential basis to J. K. Investo Trade (India) Limited. Biocon and Equillum Inc. a clinical-stage biotechnology company leveraging deep understanding of immunobiology to develop products to treat severe autoimmune and inflammatory



disorders, announced that they have expanded their collaboration and license agreement for itolizumab to grant Equillum exclusive rights for developing and commercializing itolizumab in Australia and New Zealand.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	54.2	(0.8)	38.2
MF(INR cr)	585.9	568.5	314.6

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	34,884	36,228	36,882
F&O(INR cr)	2,602,612	1,512,746	1,356,970

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.0	15.9
NSE VIX	13.4	14.0	16.9

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,665	1.3 %	4.4 %	Energy	15,950	0.7 %	(3.5) %
IT	14,973	(1.0) %	(5.5) %	Pharma	8,045	1.0 %	(14.2) %
Metals	2,569	2.4 %	(17.2) %	Finance	14,293	0.9 %	14.3 %
Auto	7,942	1.3 %	(5.6) %	PSU	2,471	2.2 %	(27.0) %
FMCG	30,228	0.4 %	0.1 %	Real Estate	283	0.9 %	5.9 %

## 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	291	8.5 %	(65.6) %	Infosys	702	(2.6) %	(7.0) %
Tata Motor	71	7.2 %	(23.7) %	O N G C	126	(1.6) %	(19.9) %
Tata Motor	173	7.1 %	(7.5) %	HCL Techno	536	(1.4) %	(3.4) %
Yes Bank	45	6.0 %	(83.6) %	Petronet L	272	(1.3) %	9.7 %
Vedanta	144	4.0 %	(23.8) %	General In	229	(1.3) %	(7.0) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
German Wholesale Price Index (MoM) (NOV)	13-12-2019	12:30	EUR	-	(0.001)
BoE/TNS Inflation Next 12 Mths (NOV)	13-12-2019	15:00	GBP	-	0.033
Industrial Production (YoY) (OCT F)	13-12-2019	10:00	JPY	-	(0.074)
Tankan Large All Industry Capex (4Q)	13-12-2019	5:20	JPY	-	0.066
BOJ Outright Bond Purchase 1~3 Years	13-12-2019	6:40	JPY	-	-
BusinessNZ Manufacturing PMI (NOV)	13-12-2019	3:00	NZD	-	52.6
Retail Sales Advance (MoM) (NOV)	13-12-2019	19:00	USD	-	0.003
Business Inventories (OCT)	13-12-2019	20:30	USD	-	0
Fed's Williams Discusses Topics in Monetary Policy	13-12-2019	21:30	USD	-	-
Baker Hughes U.S. Rig Count (DEC 13)	13-12-2019	23:30	USD	-	799

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