



14 Jan.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,343	0.1 %	5.8 %
BSE SENSEX	41,860	0.6 %	7.7 %
CNX BANK	32,178	0.0 %	6.1 %
CNX MIDCAP	17,528	0.0 %	(4.4) %
CNX SMALLCAP	6,115	0.0 %	(9.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,907	0.3 %	1.3 %
S&P 500	3,288	0.7 %	1.8 %
FTSE 100	7,618	0.4 %	0.2 %
HANG SENG	28,955	1.1 %	1.4 %
NIKKEI	23,851	0.5 %	2.8 %
SHANGHAI COMPOSITE	3,116	0.8 %	1.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.70	(1.2) %	(0.7) %
EUR/USD	1.11	(0.0) %	(0.8) %
GBP/USD	1.30	(0.9) %	(1.4) %
USD/JPY	109.80	1.1 %	1.1 %
USD/AUD	1.45	(0.6) %	1.5 %
USD/SGD	1.35	(0.3) %	0.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	(1.6) %	(5.1) %
Gold(INR/10g)	39,602	(0.0) %	1.6 %
Gold Comex(USD/oz)	1,539	(1.6) %	(0.2) %
SILVER(INR/1Kg)	46,189	0.1 %	0.3 %
Aluminium(USD/MT)	1,767	(0.3) %	(0.3) %
Copper(USD/MT)	6,177	0.3 %	0.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.9	0.0 %	(0.1) %

Global Economy: Automobile sales in China continued to drop in December. The total vehicle sales plummeted around 8.2% for the whole year 2019, figures from the industry body the China Association of Automobile Manufacturers, or CAAM, showed on Monday. In 2019, China's vehicle production also dropped 7.5% from a year ago. Despite the drop, the production and sales figures at 25.712 million units and 25.769 million units, respectively, remained the highest in the world. Passenger car sales, which account for over 83% of total vehicle sales, fell 9.6% from a year ago. Automobile sales fell by a marginal 0.1% in December. Germany's wholesale prices continued to decline in December, data from Destatis showed Monday. Wholesale prices dropped 1.3% year-on-year in December but slower than the 2.5% decline seen in November. This was the sixth consecutive fall in wholesale prices. The UK economy shrank in November due the weakness in services and industrial output, data from the Office for National Statistics showed Monday. Gross domestic product contracted 0.3% on month. GDP had advanced 0.1% in both September and October. In three months to November, the economy grew 0.1% sequentially after rising by revised 0.2% in three months to October.

Global Equities: Sentiments remained supportive for global stocks amid continued optimism about impact of the phase one US-China trade deal due to be signed later this week. The Nasdaq and the S&P 500 ended the session at new record closing highs.

Indian Economy: The consumer price index (CPI) continued to breach the Reserve Bank of India's (RBI's) medium-term target of 4% in December at 7.35%, which is highest since July 2014. This also marks a sharp spurt in inflation from November when retail inflation was 5.54%. India's external debt has increased since 2017-18 primarily on account of external commercial borrowings (ECB), non-resident deposits, and short-term trade credit. As at end-September 2019, India's external debt was placed at US\$ 557.5 billion - recording an increase of US\$ 14.3 billion (i.e., 2.6%) over its level at end-March 2019. Notwithstanding an increase in absolute value terms, India's external debt has remained at about 20% of GDP since 2017-18, says RBI.

Equity Markets: Key benchmark indices hit record highs on Monday, supported by positive global shares. Easing crude oil prices and strengthening rupee also boosted sentiment. The market also reacted to the positive IIP numbers released by the government on Friday. IT major Infosys was the biggest contributor to index gains. The stock got a boost after encouraging Q3 numbers. The barometer BSE S&P Sensex rose 259.97 points or 0.62% to 41,859.69, its record closing high. The index hit a record high of 41,899.63 in intraday trades. The Nifty 50 index gained 72.75 points or 0.59% to 12,329.55, its record closing high. The index hit a record high of 12,337.75 in intraday trades.

Corporate News: Infosys said the company has partnered with GEFCO, a world leader in multimodal supply chain solutions and the European leader in automotive logistics, to support its digital transformation over the next five years. Indian Railway Catering Tourism Corporation (IRCTC) said Ministry of Railways has given its approval to IRCTC to operate 82901/82902 Ahmedabad-Mumbai Central Tejas Express (06 days a week). This train will have its inaugural run on 17 January 2020 and will start its commercial run from 19 January 2020. Aster DM Healthcare said the board has approved the shares buyback for up to 57.14 lakh equity shares fully paid-up of Rs 10 per equity share representing up to 1.13 % of the total paid-up Equity Share capital of the company at a price of Rs 210, for an aggregate amount of up to Rs 120 crore, being 4.69% and 5.42% of the fully paid-up Equity Share capital and free reserves. IT major Wipro will announce its Q3 result today, 14 January 2020.



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)	35,201	34,168	37,182
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	12.3	13.1	15.0
NSE VIX	14.3	13.7	16.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,178	0.3 %	6.1 %	Energy	16,043	0.6 %	(3.0) %
IT	16,226	1.7 %	2.4 %	Pharma	8,078	0.2 %	(13.8) %
Metals	2,874	1.2 %	(7.4) %	Finance	14,635	0.2 %	17.1 %
Auto	8,236	0.1 %	(2.1) %	PSU	2,469	0.3 %	(27.1) %
FMCG	30,713	1.1 %	1.7 %	Real Estate	317	2.1 %	18.7 %

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>
New India	157	6.9 %	(16.8) %	Yes Bank	42	(5.9) %	(84.7) %
General In	258	5.8 %	4.7 %	Page Indus	23,157	(2.4) %	(9.3) %
Infosys	774	4.8 %	2.4 %	Motherson	146	(1.8) %	(5.1) %
Bandhan Ba	514	4.4 %	(3.0) %	ICICI Lomb	1,354	(1.5) %	33.3 %
L&T Fin.Ho	127	3.9 %	(16.7) %	Hind.Zinc	216	(1.5) %	(24.0) %

EVENTS CALENDAR

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

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