



14 Jan.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,565	0.0 %	76.5 %
BSE SENSEX	49,492	(0.1) %	75.1 %
CNX BANK	32,575	0.7 %	78.9 %
CNX MIDCAP	22,155	(0.6) %	93.1 %
CNX SMALLCAP	7,434	(0.2) %	110.0 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,060	(0.0) %	1.5 %
S&P 500	3,810	0.2 %	1.4 %
FTSE 100	6,746	(0.1) %	2.6 %
HANG SENG	28,236	(0.2) %	2.8 %
NIKKEI	28,457	1.0 %	4.4 %
SHANGHAI COMPOSITE	3,599	(0.3) %	2.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.41	0.2 %	0.6 %
EUR/USD	1.22	(0.4) %	(0.8) %
GBP/USD	1.35	(0.4) %	(1.1) %
USD/JPY	104.18	0.2 %	1.0 %
USD/AUD	1.30	0.6 %	0.1 %
USD/SGD	1.33	0.3 %	0.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	1.9 %	11.8 %
Gold(INR/10g)	49,285	(0.4) %	(3.4) %
Gold Comex(USD/oz)	1,863	0.7 %	(4.4) %
SILVER(INR/1Kg)	65,174	(0.6) %	(5.4) %
Aluminium(USD/MT)	2,026	0.9 %	0.6 %
Copper(USD/MT)	7,983	0.4 %	0.8 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.1	(0.0) %	0.2 %

Global Economy: US consumer price index rose by 0.4% in December after edging up by 0.2% in November. The Labor Department said the advance by the consumer price index was driven by an 8.4% jump in gasoline prices, which accounted for more than 60% of the overall increase. Excluding food and energy prices, the core consumer price index inched up by 0.1% in December after rising by 0.2% in November. Eurozone industrial production growth accelerated in November driven by robust growth in capital goods output, data from Eurostat showed Wednesday. Industrial output climbed 2.5% month-on-month, faster than the 2.3% increase seen in October. This was the fastest growth in four months. Germany's wholesale prices fell 1.2% on a yearly basis in December, following a 1.7% drop a month ago, Destatis reported on Wednesday. This was the slowest fall in prices since February. On a monthly basis, wholesale price growth accelerated to 0.6% from 0.1% in November. This was the second consecutive rise. Bank of England Governor Andrew Bailey reportedly said the third national lockdown to contain the spread of the coronavirus will delay the economic recovery. He said the second wave would 'delay, probably, the trajectory' of recovery. Although the unemployment rate is officially at 4.9%, the rate is likely to be around 6.5%, he noted. Japan's money supply rose a slightly faster pace in December, the Bank of Japan reported Wednesday. The monetary aggregate M2 gained by 9.2% annually after rising 9.1% in November. The annual growth in M3 held steady at 7.6%. Currency in circulation advanced 5.7% on year, following a 6% increase in November. The narrow measure M1 also rose 13.8% compared to a 14% spurt in the previous month.

Global Equities: US stocks saw choppy moves. Overall sentiments were supported as stimulus hopes dominated markets.

Indian Economy: The Reserve Bank of India on Wednesday constituted a working group to suggest regulatory measures to promote orderly growth of digital lending. The Index of Industrial Production (IIP) saw a contraction of 1.9% for November 2020, reverting back to the declining territory after rising in the previous two months, data released by the Ministry of Statistics & Programme Implementation (MOSPI) showed on Tuesday. India's Consumer Price Index inflation softened to 4.59% in December 2020 as compared to 6.93% in November and 7.35% in December 2019. India's active Covid-19 caseload has fallen to 2.14 lakh (2,14,507). The share of Active Cases in the total Positive Cases has further shrunk to 2.04%. This is lowest after 197 days.

Equity Markets: The domestic equity barometers ended almost flat after a volatile session on Wednesday. Select autos and PSU banks advanced while pharma and financial stocks lagged. The sentiment remained upbeat after the domestic retail inflation cooled off in December, falling below RBI's upper tolerance limit of 6%.

Corporate News: IT major Infosys reported a 7.3% rise in profit at Rs 5,197 crore in Q3FY21 against Rs 4,845 crore in Q2FY21 while revenue rose 5.5% to Rs 25,927 crore from Rs 24,570 crore QoQ. The company raised FY21 constant currency revenue growth guidance to 4.5-5% from 2-3% earlier and margin guidance to 24-24.5% from 23-24% earlier. Wipro reported a consolidated profit of Rs 2,966.70 crore for the Q3FY21, increasing around 21% compared to Rs 2,455.80 crore in the corresponding quarter of the previous year. Consolidated revenue for the quarter stood at Rs 15,670 crore, which was higher by 1.3% compared to Rs 15,470.50 crore reported in the Q3FY20. The company's dollar revenue growth came at 3.9% versus 3.7% QoQ. The dollar revenue growth was the highest in 36 quarters. The Union Cabinet chaired by Prime Minister Narendra Modi approved structural reforms in the mining sector, media reports noted.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	128.3	240.5	165.3
MF(INR cr)	(1,200.6)	(1,236.3)	(537.0)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	93,571	69,260	58,994
F&O(INR cr)	4,298,485	2,991,671	2,128,878

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.3	24.1	28.9
NSE VIX	23.3	21.2	26.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,575	0.7 %	78.9 %	Energy	17,430	0.6 %	61.8 %
IT	27,004	0.1 %	124.2 %	Pharma	13,123	(0.9) %	86.8 %
Metals	3,523	0.4 %	126.8 %	Finance	15,624	(0.6) %	74.7 %
Auto	10,209	0.9 %	119.2 %	PSU	1,973	3.3 %	53.7 %
FMCG	34,618	0.4 %	31.3 %	Real Estate	338	(0.3) %	96.2 %

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>
Bank of Ba	75	6.4 %	46.8 %	Bandhan Ba	375	(4.2) %	92.5 %
M & M	828	6.2 %	203.6 %	Muthoot Fi	1,237	(3.1) %	104.7 %
Adani Port	537	5.0 %	119.2 %	H D F C	2,671	(2.8) %	68.7 %
St Bk of I	307	4.9 %	64.5 %	Bajaj Fina	4,903	(2.8) %	120.9 %
DLF	280	4.8 %	111.6 %	Interglobe	1,634	(2.8) %	63.5 %

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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