



14 Feb.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,175	(0.2) %	4.3 %
BSE SENSEX	41,460	(0.3) %	6.7 %
CNX BANK	31,230	(0.8) %	3.0 %
CNX MIDCAP	18,125	(0.2) %	(1.1) %
CNX SMALLCAP	6,175	(0.0) %	(8.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,423	(0.4) %	3.1 %
S&P 500	3,374	(0.2) %	4.4 %
FTSE 100	7,452	(1.1) %	(2.0) %
HANG SENG	27,730	(0.3) %	(2.9) %
NIKKEI	23,828	(0.1) %	2.7 %
SHANGHAI COMPOSITE	2,906	(0.7) %	(5.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.22	0.1 %	0.0 %
EUR/USD	1.09	(0.5) %	(3.2) %
GBP/USD	1.30	0.5 %	(1.4) %
USD/JPY	109.81	(0.0) %	1.1 %
USD/AUD	1.49	(0.2) %	4.3 %
USD/SGD	1.39	0.1 %	3.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	51	0.5 %	(16.0) %
Gold(INR/10g)	40,619	0.4 %	4.2 %
Gold Comex(USD/oz)	1,573	0.2 %	2.0 %
SILVER(INR/1Kg)	45,842	0.4 %	(0.5) %
Aluminium(USD/MT)	1,702	(0.3) %	(4.0) %
Copper(USD/MT)	5,716	(0.5) %	(7.3) %

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	(0.0) %	(0.3) %

Global Economy: The US Labor Department said its consumer price index rose by 0.1% in January after rising by 0.2% in December. The European economy remains on a path of steady and moderate growth, the European Commission said in its Winter Forecast, published on Thursday. The EU retained its growth projections for the 19-nation currency bloc. The agency forecast the economy to grow 1.2% each this year and next. Germany's consumer price inflation rose 1.7% year-on-year in January following a 1.5% increase in December, driven by a jump in energy prices, final figures from Destatis showed on Thursday. The latest inflation rate was the highest since July, when it was at 1.7%. Food price inflation accelerated to 2.3% from 2.1%. UK housing market activity improved in January with demand, sales and fresh listing all moving into positive territory, survey data from the Royal Institution of Chartered Surveyors, or RICS, showed Thursday. The house price balance rose to +17% in January from -2% in December. Japan producer prices were up 0.2% on month in January, the Bank of Japan said on Thursday, following the 0.1% increase in December. On a yearly basis, producer prices jumped 1.7%, up sharply from 0.9% in the previous month.

Global Equities: Stocks eased as novel coronavirus stayed in focus. Chinese shares ended lower to snap a seven-day rally after around 240 deaths from the new coronavirus were recorded in the Chinese province of Hubei on Wednesday - the bulk of it due to a reclassification.

Indian Economy: Rating agency Standard and Poor affirmed India's sovereign rating of 'BBB-' and maintained a "stable" outlook, according to media reports. Despite a notable deceleration in India's economy in recent quarters, we believe its structural growth outperformance remains intact. Real Gross Domestic (GDP) growth is therefore likely to gradually recover in the longer-run, may be over the next two to three years, S&P said in a statement. Reserve Bank Of India (RBI) reported that currency in circulation jumped by 1.1% on the week to stand at Rs 23.37 lakh crore as on 7th February 2020. Import of vegetable oils during January 2020 is reported at 1,195,812 tons compared to 1,275,259 tons in January 2019, consisting 1,157,123 tons of edible oils and 38,689 tons of non-edible oils i.e. down by 6%.

Equity Markets: Key market barometers ended with small losses on Thursday. While private banks dragged the indices lower, gains in IT shares provided support. Trading was volatile due to expiry of weekly index options on the NSE. The barometer S&P BSE Sensex, was down 106.11 points or 0.26% at 41,459.79. The Nifty 50 index lost 26.55 points or 0.22% at 12,174.65. The sentiment was affected by weak domestic economic data on industrial output and elevated inflation.

Corporate News: Bharat Petroleum Corporation reported 239.47% jump in consolidated net profit to Rs 1776.35 crore on 5.63% fall in total income to Rs 75,962.64 crore in Q3 December 2019 over Q3 December 2018. Nestle India reported 38.41% rise in net profit to Rs 473.02 crore on 7.45% rise in total income to Rs 3,193.99 crore in Q3 December 2019 over Q3 December 2018. Apollo Hospitals Enterprise reported 61.51% rise in consolidated net profit to Rs 92.14 crore on 16.52% rise in total income to Rs 2,921.76 crore in Q3 December 2019 over Q3 December 2018. Page Industries reported 14.59% fall in consolidated net profit to Rs 87.02 crore on 6.62% rise in total income to Rs 797.28 crore in Q3 December 2019 over Q3 December 2018.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(93.1)	247.9	50.2
MF(INR cr)	241.6	41.9	244.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	36,366	38,284	37,209
F&O(INR cr)	2,846,772	1,692,828	1,401,594

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.2	15.3	14.9
NSE VIX	13.4	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	31,230	(0.8) %	3.0 %	Energy	15,191	(0.3) %	(8.1) %
IT	16,673	0.8 %	5.3 %	Pharma	8,336	0.9 %	(11.1) %
Metals	2,652	(0.6) %	(14.5) %	Finance	14,579	(0.7) %	16.6 %
Auto	7,915	(0.2) %	(5.9) %	PSU	2,256	0.3 %	(33.3) %
FMCG	31,039	0.2 %	2.8 %	Real Estate	314	(0.4) %	17.4 %

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>
Yes Bank	37	5.7 %	(86.5) %	NMDC	110	(4.1) %	4.4 %
Dr Reddy's	3,325	4.0 %	19.0 %	General In	229	(3.9) %	(7.2) %
Shriram Tr	1,262	3.6 %	2.1 %	Bandhan Ba	452	(3.8) %	(14.7) %
United Spi	710	2.6 %	29.3 %	Indiabulls	327	(3.8) %	(61.4) %
Bajaj Hold	3,905	2.6 %	16.5 %	IndusInd B	1,231	(3.7) %	(29.4) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Existing Home Sales (MoM) (JAN)	14-02-2020	19:30	CAD	-	(0.009)
Producer & Import Prices (MoM) (JAN)	14-02-2020	13:00	CHF	-	0.001
German Gross Domestic Product n.s.a. (YoY) (4Q P)	14-02-2020	12:30	EUR	-	0.01
Euro-Zone Gross Domestic Product s.a. (YoY) (4Q P)	14-02-2020	15:30	EUR	-	0.01
Tertiary Industry Index (MoM) (DEC)	14-02-2020	10:00	JPY	-	0.013
Foreign Buying Japan Bonds (FEB 7)	14-02-2020	5:20	JPY	-	-
Gross Domestic Product Annualized s.a. (QoQ) (4Q P)	14-02-2020	5:20	JPY	-	0.018
BusinessNZ Manufacturing PMI (JAN)	14-02-2020	3:00	NZD	-	49.3
Performance Services Index (JAN)	14-02-2020	3:00	NZD	-	51.9
Food Prices (MoM) (JAN)	14-02-2020	3:15	NZD	-	(0.002)
Net Migration s.a. (DEC)	14-02-2020	3:15	NZD	-	2610
Retail Sales Advance (MoM) (JAN)	14-02-2020	19:00	USD	-	0.003
Industrial Production (MoM) (JAN)	14-02-2020	19:45	USD	-	(0.003)
U. of Mich. Sentiment (FEB P)	14-02-2020	20:30	USD	-	99.8
Fed's Mester Discusses Payments Modernization	14-02-2020	22:15	USD	-	-
Baker Hughes U.S. Rig Count (FEB 14)	14-02-2020	23:30	USD	-	790
Fed's Williams Speaks in New York	14-02-2020	4:00	USD	-	-

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