



15 Jan.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,319	(0.4) %	5.6 %
BSE SENSEX	41,953	0.2 %	7.6 %
CNX BANK	31,837	(0.7) %	5.0 %
CNX MIDCAP	17,647	(0.0) %	(3.7) %
CNX SMALLCAP	6,162	(0.0) %	(8.5) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,940	0.1 %	1.4 %
S&P 500	3,283	(0.2) %	1.6 %
FTSE 100	7,622	0.1 %	0.2 %
HANG SENG	28,885	(0.2) %	1.2 %
NIKKEI	24,025	0.7 %	3.5 %
SHANGHAI COMPOSITE	3,107	(0.3) %	0.7 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.75	(0.7) %	(0.6) %
EUR/USD	1.11	0.2 %	(0.8) %
GBP/USD	1.30	(0.6) %	(1.4) %
USD/JPY	110.04	0.6 %	1.3 %
USD/AUD	1.45	(0.5) %	1.6 %
USD/SGD	1.35	(0.3) %	0.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	0.3 %	(4.8) %
Gold(INR/10g)	39,602	0.0 %	1.6 %
Gold Comex(USD/oz)	1,550	0.7 %	0.5 %
SILVER(INR/1Kg)	46,189	0.0 %	0.3 %
Aluminium(USD/MT)	1,768	0.1 %	(0.3) %
Copper(USD/MT)	6,247	1.1 %	1.3 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.8	(0.0) %	(0.1) %

**Global Economy:** US consumer prices increased by slightly less than anticipated in the month of December, according to a report released by the Labor Department on Tuesday. The Labor Department said its consumer price index rose by 0.2% in December after climbing by 0.3% in November. China's exports edged up 0.5% in US dollar terms in 2019, recording a sharp deceleration from a surge of 9.9% in 2018, according to data released on Tuesday. However, in December, China's exports grew by 7.6%, up from minus 1.3% in November. Imports rose 16.3% in December, up from 0.3% in November. This is first time China's exports have risen since March 2019. Japan recorded a current account surplus of 1,436.8 billion yen in November, the Ministry of Finance said on Tuesday - jumping 75% on year. The trade balance showed a deficit of 2.5 billion yen, missing expectations for a surplus of 103.8 billion yen and down from the surplus of 254.0 billion yen in the previous month. Exports were down 10.2% on year to 6,244.2 billion yen, while imports fell an annual 16.6% to 6,246.6 billion yen. Overall bank lending in Japan rose 1.8% on year in December, the Bank of Japan said on Tuesday - coming in at 544.091 trillion yen. The reading stood at 2.1% in November. A measure of the public assessment of the Japanese economy edged up for the second straight month in December, survey data from the Cabinet Office showed on Tuesday. The current conditions index of the Economy Watchers' Survey, which measures the current situation of the economy, increased to 39.8 in December from 39.4 in November.

**Global Equities:** Sentiments remained supportive for global stocks amid continued optimism about impact of the phase one US-China trade deal. Dow Jones hit a record high above 29,000 in last session.

**Indian Economy:** India's Wholesale Price Index (WPI)-based inflation, base year 2011-12, accelerated to 7-months high of 2.6% in December 2019, showing sharp increase from 0.6% in November 2019. Among the three major sub-groups, the inflation for primary articles and fuel and power increased, while inflation for manufactured products group also moved up in December 2019. The core inflation (manufactured products excluding foods products) rebounded to (-) 1.5% in December 2019, after consistent moderation for last 13 straight months to (-) 1.9% in November 2019 from 4.9% in October 2018. The WPI inflation is revised downwards to 0.0% for October 2019 from 0.2% reported at provisional level. The economic slowdown has adversely impacted employment generation in the country as nearly 16 lakh less jobs are projected to be created in FY20 compared to 89.7 lakh fresh jobs in FY19, according to the latest edition of SBI research report- Ecwrap.

**Equity Markets:** Key benchmark equity indices crawled higher on Tuesday. Gains were capped as surge in domestic inflation numbers dashed hopes of further monetary easing by the central bank. The broader market, however, ended firm amid positive global cues. The Nifty 50 index ended above 12,350 level. The barometer BSE S&P Sensex rose 89.24 points or 0.21% to 41,948.93, as per the provisional closing data. The Nifty 50 index gained 32.75 points or 0.27% to 12,362.30, as per the provisional closing data.

**Corporate News:** Wipro, on consolidated basis, reported 3.79% decline in net profit to Rs 2,455.90 crore on 2.28% increase in revenue to Rs 15,470.50 crore in Q3 December 2019 over Q2 September 2019. IT services segment revenue rose 3.03% to Rs 15,100.60 crore in Q3 December 2019 over Q2 September 2019. In dollar terms, IT services segment revenue was at \$2,094.8 million, a sequential growth of 2.2%. The company expects revenue from IT services business to be in the range of \$2,095 million to \$2,137 million. This translates to a sequential growth of 0.0% to 2.0%. Mindtree, on consolidated basis, reported 45.93% rise in net profit to Rs 197.00 crore on 3.42% increase in revenue to Rs 2,000.10 crore in Q3 December 2019 over Q2 September 2019. Digital business grew by 13.5% y-o-y. Canara Bank said that it has decided to call-off the divestment process of its entire stake in Can Fin Homes, which was under progress.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	17.1	42.2	40.3
MF(INR cr)	302.8	263.7	276.6

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,022	34,553	37,187
F&O(INR cr)	1,043,298	1,777,853	1,369,153

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.4	13.0	14.9
NSE VIX	13.9	13.7	16.4

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	32,072	(0.3) %	5.8 %	Energy	16,053	0.1 %	(2.9) %
IT	16,362	0.8 %	3.3 %	Pharma	8,117	0.5 %	(13.4) %
Metals	2,901	0.9 %	(6.5) %	Finance	14,667	0.2 %	17.3 %
Auto	8,289	0.6 %	(1.5) %	PSU	2,462	(0.3) %	(27.3) %
FMCG	31,145	1.4 %	3.2 %	Real Estate	317	(0.1) %	18.5 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Aurobindo	480	4.3 %	(39.4) %	Yes Bank	39	(8.4) %	(86.0) %
Berger Pai	530	4.1 %	60.5 %	IndusInd B	1,482	(3.8) %	(15.0) %
Page Indus	23,920	3.3 %	(6.3) %	Shriram Tr	1,132	(3.1) %	(8.4) %
Vedanta	165	2.8 %	(12.7) %	Motherson	142	(2.5) %	(7.4) %
HDFC AMC	3,142	2.6 %	101.9 %	Indiabulls	307	(2.0) %	(63.7) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Existing Home Sales (MoM) (DEC)	15-01-2020	19:30	CAD	-	0.006
German Gross Domestic Product NSA (YoY) (2019)	15-01-2020	14:30	EUR	-	0.015
Euro-Zone Industrial Production w.d.a. (YoY) (NOV)	15-01-2020	15:30	EUR	-	(0.022)
BOE's Saunders Speaks in Bangor, Northern Ireland	15-01-2020	14:10	GBP	-	-
Consumer Price Index (YoY) (DEC)	15-01-2020	15:00	GBP	-	0.015
Machine Tool Orders (YoY) (DEC P)	15-01-2020	11:30	JPY	-	(0.379)
Japan Money Stock M2+CD (YoY) (DEC)	15-01-2020	5:20	JPY	-	0.028
Kuroda Speech at Branch Managers' Meeting	15-01-2020	6:00	JPY	-	-
Food Prices (MoM) (DEC)	15-01-2020	3:15	NZD	-	(0.007)
MBA Mortgage Applications (JAN 10)	15-01-2020	17:30	USD	-	0.135
Empire Manufacturing (JAN)	15-01-2020	19:00	USD	-	3.5
DOE U.S. Crude Oil Inventories (JAN 10)	15-01-2020	21:00	USD	-	-
Fed's Harker Speaks in New York	15-01-2020	21:30	USD	-	-
Fed's Kaplan Speaks to the Economic Club of New York	15-01-2020	22:30	USD	-	-

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