



16 Jan.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,347	0.0 %	5.8 %
BSE SENSEX	41,873	(0.2) %	7.9 %
CNX BANK	31,825	0.0 %	4.9 %
CNX MIDCAP	17,836	0.0 %	(2.7) %
CNX SMALLCAP	6,229	0.0 %	(7.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,030	0.3 %	1.7 %
S&P 500	3,289	0.2 %	1.8 %
FTSE 100	7,643	0.3 %	0.5 %
HANG SENG	28,774	(0.4) %	0.8 %
NIKKEI	23,917	(0.5) %	3.1 %
SHANGHAI COMPOSITE	3,090	(0.5) %	0.2 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.70	0.0 %	(0.7) %
EUR/USD	1.11	0.1 %	(0.7) %
GBP/USD	1.30	0.2 %	(1.2) %
USD/JPY	109.91	0.1 %	1.2 %
USD/AUD	1.45	0.2 %	1.7 %
USD/SGD	1.35	0.0 %	0.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	(0.7) %	(5.5) %
Gold(INR/10g)	39,602	0.0 %	1.6 %
Gold Comex(USD/oz)	1,557	0.5 %	0.9 %
SILVER(INR/1Kg)	46,189	0.0 %	0.3 %
Aluminium(USD/MT)	1,779	0.6 %	0.4 %
Copper(USD/MT)	6,232	(0.2) %	1.1 %

**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:** The Federal Reserve's Beige Book, a compilation of anecdotal evidence on economic conditions in the twelve Fed districts said Wednesday that economic activity generally continued to expand modestly. Consumer spending growth was described as modest to moderate, with holiday sales said to be solid amid the increasing importance of online shopping. The Fed said employment was steady to rising modestly in most districts, while labor markets remained tight throughout the nation. Eurozone industrial production grew 0.2% on month in November, in contrast to a 0.9% fall in October, data from Eurostat showed Wednesday. Among components, capital goods and energy output advanced 1.2% and 0.8%, respectively. On a yearly basis, industrial output fell 1.5% versus a 2.6% drop logged a month ago and the forecast of 1% decrease. Eurozone exports fell 2.8% on a monthly basis and imports were down marginally by 0.5% in November, data from Eurostat showed Wednesday. As a result, the trade surplus decreased to a seasonally adjusted EUR 19.2 billion from EUR 24 billion in October. On a yearly basis, exports declined 2.9% in November. At the same time, imports fell 4.6%. Consequently, the trade surplus rose to EUR 20.7 billion from EUR 18.2 billion in the same period last year. Germany gross domestic product grew a price-adjusted 0.6% in 2019 from the previous year, when it rose 1.5%, preliminary figures from the statistical office Destatis showed on Wednesday. The economy expanded for a tenth year in a row, but at the slowest pace in six years in 2019. UK consumer price inflation eased to a three-year low in December. The Bank of Japan downgraded the economic view of three out of nine regions.

**Global Equities:** Dow closed above 29,000 for the first time. The S&P 500 also closed at a new high as the US and China signed a deal aimed at easing tensions between the two economic giants.

**Indian Economy:** The Parliamentary standing committee on labour has invited suggestions from all stakeholders and the public in general on the Industrial Relations Code, 2019 and the Code on Social Security, 2019 after the two labour codes were referred to the standing committee after being introduced in the Lok Sabha in the last winters session.

**Equity Markets:** Key barometers snapped four-day rising streak on Wednesday, as weakness in other Asian stocks triggered profit selling in the domestic market. Asian stock markets came under selling pressure after US Treasury Secretary said that the United States would continue tariffs on Chinese goods until the completion of a second phase of a US-China trade agreement. The barometer BSE S&P Sensex fell 56.47 points or 0.13% to 41,896.16, as per the provisional closing data. The Nifty 50 index lost 21.95 points or 0.18% to 12,340.35, as per the provisional closing data.

**Corporate News:** Bharti Airtel said that the company has raised \$2 billion through the QIP route; which saw participation by highly reputed global and Indian investors. The company accordingly will issue 323,595,505 equity shares of face value of Rs 5 per equity share at a price of Rs 445 which implies a discount of 1.57% on the SEBI determined floor price of Rs 452.09 per equity share. Indian Oil Corporation said the company has issued 20,000 unsecured, rated, taxable, redeemable, non-convertible debentures (series-XV) of Rs 10,00,000 each aggregating to Rs 2,000 crore on private placement basis on 14 January 2020 to meet its capex requirements. Asian Paints informed that Competition Commission of India, (CCI) has passed a prima facie order dated 14 January 2020, directing the Director General to cause an investigation against the company, basis information received from JSW Paints.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(46.7)	38.7	40.2
MF(INR cr)	302.8	263.7	276.6

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,751	35,026	37,200
F&O(INR cr)	1,044,469	1,614,213	1,364,910

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.4	13.0	14.9
NSE VIX	14.1	13.7	16.4

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,825	(0.8) %	4.9 %	Energy	16,019	(0.2) %	(3.1) %
IT	16,347	(0.1) %	3.2 %	Pharma	8,166	0.6 %	(12.9) %
Metals	2,921	0.7 %	(5.8) %	Finance	14,636	(0.2) %	17.1 %
Auto	8,385	1.2 %	(0.3) %	PSU	2,463	0.0 %	(27.2) %
FMCG	31,237	0.3 %	3.5 %	Real Estate	321	1.3 %	20.1 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
New India	165	6.6 %	(12.5) %	IndusInd B	1,401	(5.5) %	(19.7) %
Piramal En	1,536	6.3 %	(41.6) %	Bandhan Ba	492	(5.1) %	(7.1) %
NMDC	131	4.2 %	24.4 %	Wipro	248	(3.5) %	(5.1) %
General In	265	3.6 %	7.6 %	Shriram Tr	1,099	(3.0) %	(11.1) %
Yes Bank	40	3.1 %	(85.6) %	Motherson	139	(2.2) %	(9.4) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Home Loans Value (MoM) (NOV)	16-01-2020	6:00	AUD	-	0.02
New Home Prices (MoM) (DEC)	16-01-2020	7:00	CNY	-	0.003
German Consumer Price Index (YoY) (DEC F)	16-01-2020	12:30	EUR	-	0.015
Accounts of the ECB's December Meeting (DEC)	16-01-2020	17:00	EUR	-	-
ECB President Lagarde Speaks in Frankfurt	16-01-2020	23:30	EUR	-	-
Bank of England Bank Liabilities/Credit Conditions Surveys	16-01-2020	15:00	GBP	-	-
RICS House Price Balance (DEC)	16-01-2020	5:31	GBP	-	(0.12)
Machine Orders (YoY) (NOV)	16-01-2020	5:20	JPY	-	(0.061)
BOJ Outright Bond Purchase 5~10 Years	16-01-2020	6:40	JPY	-	-
Card Spending Retail (MoM) (DEC)	16-01-2020	3:15	NZD	-	0.026
U.S. Federal Reserve Releases Beige Book	16-01-2020	0:30	USD	-	-
Retail Sales Advance (MoM) (DEC)	16-01-2020	19:00	USD	-	0.002
Business Inventories (NOV)	16-01-2020	20:30	USD	-	0.002
EIA Natural Gas Storage Change (JAN 10)	16-01-2020	21:00	USD	-	(44)
U.S. to Sell 4-Week Bills	16-01-2020	22:00	USD	-	-

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