



16 Dec.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,087	1.0 %	3.6 %
BSE SENSEX	41,010	1.1 %	5.5 %
CNX BANK	32,014	1.1 %	5.6 %
CNX MIDCAP	16,932	1.0 %	(7.6) %
CNX SMALLCAP	5,652	0.8 %	(16.1) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,135	0.0 %	20.6 %
S&P 500	3,169	0.0 %	26.4 %
FTSE 100	7,353	1.1 %	9.2 %
HANG SENG	27,688	2.6 %	10.2 %
NIKKEI	24,023	2.6 %	22.8 %
SHANGHAI COMPOSITE	2,968	1.8 %	20.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.55	(0.2) %	1.6 %
EUR/USD	1.11	0.3 %	(2.8) %
GBP/USD	1.32	0.3 %	3.6 %
USD/JPY	108.88	0.2 %	(0.7) %
USD/AUD	1.45	(0.7) %	2.1 %
USD/SGD	1.36	(0.2) %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	0.0 %	27.2 %
Gold(INR/10g)	37,691	(0.2) %	19.5 %
Gold Comex(USD/oz)	17 (98.8) %	(98.7) %	
SILVER(INR/1Kg)	43,884	0.6 %	14.7 %
Aluminium(USD/MT)	1,764	0.5 %	(5.1) %
Copper(USD/MT)	6,154	0.9 %	5.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.8	(0.1) %	(0.8) %

Global Economy: The US Commerce Department said business inventories rose by 0.2% in October after edging down by a revised 0.1% in September. The US retail sales edged up by 0.2% in November after rising by an upwardly revised 0.4% in October. Russia's central bank on Friday cut its key interest rate for the fifth consecutive policy session, citing slowing inflation, and signaled more easing is in store. UK inflation expectations for the next 12 months and the year after eased in November, survey data from the Bank of England showed Friday. Median expectations of the rate of inflation over the coming year fell to 3.1% from 3.3% in August, the quarterly Bank of England/TNS Inflation Attitudes Survey revealed. The Board of Directors, decided to cut the key rate by 25 basis points to 6.25%, the Bank of Russia said in a statement. Japan's industrial production declined more than initially estimated in October, final data from the Ministry of Economy, Trade and Industry showed on Friday. Industrial production fell 4.5% month-on-month in October. According to the initial estimate, production had decreased 4.2%.

Global Equities: US stocks stayed supported on Friday as the US and Chinese officials announced a long-awaited agreement on a phase one trade deal.

Indian Economy: Moody's Investors Service on Friday said it has lowered its 2019 GDP growth forecast for India to 5.6% as slow employment growth weighs on consumption. It expects economic growth to pick up in 2020 and 2021 to 6.6% and 6.7% respectively, but sees the pace of growth remaining lower than past. Moody's said fiscal measures undertaken by the government - such as corporate tax rate cuts, bank recapitalisation, infrastructure spending plans, support for the auto sector and others - do not directly address widespread weakness in consumption demand, which has been the chief driver of the economy. As per the latest update from Solvent Extractors' Association of India, the import of vegetable oils during November 2019 is reported at 1,127,220 tons compared to 1,133,893 tons in November, 2018, i.e. down by 0.50%.

Equity Markets: The local stocks ended with strong gains on Friday, with the Nifty closing above 12,050 mark. The gains were supported by positive global cues triggered by US reaching 'in-principle' deal with China and Boris Johnson's crushing victory in UK election. The barometer index, the BSE Sensex, rose 428 points or 1.05% to 41,009.71. The Nifty 50 index rose 114.90 points or 0.96% to 12,086.70.

Corporate News: Reliance Industries said that the company's arm RSBVL acquired 51.8% in Asteria Aero for Rs 23.1 crore. Granules India is to sell a stake in China JV to Hubei Biocause for 109 million Japanese yen. Minda Industries said tht the company completed the acquisition of German firm Delvis Gmbh. Housing sales are estimated to rise by 4% to 2.58 lakh units across seven major cities during this calendar year on subdued demand because of liquidity crunch and overall economic slowdown, according to property brokerage firm Anarock, media reports noted.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	54.2	(0.8)	38.2
MF(INR cr)	585.9	568.5	314.6

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	38,723	36,477	36,893
F&O(INR cr)	879,129	1,449,384	1,354,192

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.0	15.9
NSE VIX	13.3	13.9	16.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,014	1.1 %	5.6 %	Energy	16,068	0.7 %	(2.8) %
IT	15,201	1.5 %	(4.0) %	Pharma	8,045	(0.0) %	(14.2) %
Metals	2,627	2.3 %	(15.3) %	Finance	14,410	0.8 %	15.3 %
Auto	8,070	1.6 %	(4.1) %	PSU	2,571	4.0 %	(24.1) %
FMCG	30,426	0.7 %	0.8 %	Real Estate	288	1.7 %	7.7 %

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>
Indiabulls	309	6.1 %	(63.5) %	Dr Reddy's	2,822	(2.9) %	1.0 %
Punjab Nat	64	6.0 %	(33.9) %	Bharti Air	428	(2.5) %	36.7 %
Axis Bank	752	4.1 %	(1.8) %	Zee Entert	280	(1.6) %	(35.2) %
Motherson	141	4.0 %	(8.3) %	Kotak Mah.	1,693	(1.3) %	26.4 %
Bank of Ba	102	3.9 %	(23.3) %	Bajaj Hold	3,315	(1.3) %	(1.1) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
CBA Australia PMI Composite (DEC P)	16-12-2019	3:30	AUD	-	49.7
RBA's Kearns Gives Speech in Sydney	16-12-2019	6:30	AUD	-	-
International Securities Transactions (Canadian dollar) (OCT)	16-12-2019	19:00	CAD	-	-
Existing Home Sales (MoM) (NOV)	16-12-2019	19:30	CAD	-	0
Domestic Sight Deposits CHF (DEC 13)	16-12-2019	14:30	CHF	-	-
New Home Prices (MoM) (NOV)	16-12-2019	7:00	CNY	-	0.005
Fixed Assets Ex Rural YTD (YoY) (NOV)	16-12-2019	7:30	CNY	-	0.052
Markit France Composite PMI (DEC P)	16-12-2019	13:30	EUR	-	52.1
Markit Germany Services PMI (DEC P)	16-12-2019	14:00	EUR	-	51.7
Euro-Zone Labour Costs (YoY) (3Q)	16-12-2019	15:30	EUR	-	0.027
Markit UK PMI Manufacturing s.a. (DEC P)	16-12-2019	15:00	GBP	-	48.9
CBI Trends Selling Prices (DEC)	16-12-2019	16:30	GBP	-	(1)
BOE Publishes Financial Stability Report, Stress Tests	16-12-2019	21:30	GBP	-	-
Rightmove House Prices (YoY) (DEC)	16-12-2019	5:31	GBP	-	0.003
Tertiary Industry Index (MoM) (OCT)	16-12-2019	10:00	JPY	-	0.018
Nikkei Japan PMI Manufacturing (DEC P)	16-12-2019	6:00	JPY	-	48.9
Performance Services Index (NOV)	16-12-2019	3:00	NZD	-	55.4
Markit US Composite PMI (DEC P)	16-12-2019	20:15	USD	-	52
NAHB Housing Market Index (DEC)	16-12-2019	20:30	USD	-	70
U.S. to Sell 13-Week Bills	16-12-2019	22:00	USD	-	-

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