



17 Jan.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,328	(0.2) %	5.6 %
BSE SENSEX	41,933	0.1 %	7.8 %
CNX BANK	31,572	(0.9) %	4.1 %
CNX MIDCAP	17,990	0.0 %	(1.9) %
CNX SMALLCAP	6,289	0.3 %	(6.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,298	0.9 %	2.7 %
S&P 500	3,317	0.8 %	2.7 %
FTSE 100	7,610	(0.4) %	0.1 %
HANG SENG	28,883	0.4 %	1.2 %
NIKKEI	23,933	0.1 %	3.1 %
SHANGHAI COMPOSITE	3,074	(0.5) %	(0.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.77	0.0 %	(0.6) %
EUR/USD	1.11	0.2 %	(0.6) %
GBP/USD	1.31	0.5 %	(1.0) %
USD/JPY	110.04	0.0 %	1.3 %
USD/AUD	1.45	(0.1) %	1.5 %
USD/SGD	1.35	(0.1) %	0.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	1.2 %	(4.3) %
Gold(INR/10g)	39,727	0.3 %	1.9 %
Gold Comex(USD/oz)	1,553	(0.3) %	0.6 %
SILVER(INR/1Kg)	46,281	0.2 %	0.5 %
Aluminium(USD/MT)	1,794	0.9 %	1.2 %
Copper(USD/MT)	6,301	1.1 %	2.2 %

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 Commerce Department said retail sales climbed by 0.3% in December, matching the upwardly revised increase in November. The National Association of Home Builders released a report on Thursday showing a slight pullback in homebuilder confidence in the month of January. The report said the NAHB/Wells Fargo Housing Market Index edged down to 75 in January after jumping to 76 in December. Europe's passenger car sales surge 21.7% on year, but this was partially due to low base effect, as registrations decreased 8.4% in December 2018. Passenger car sales totaled 1.21 million units. The agency said specific market changes also contributed to the exceptional growth in December. Germany's consumer price inflation rose 1.5% year-on-year in December, following a 1.1% increase in November and October, final data from the Federal Statistical Office showed on Thursday. This was in line with initial estimate. The latest inflation was the highest since July, when it was 1.7%. On a month-on-month basis, consumer prices rose 0.5% in December, as estimated. Japan core machine orders surged a seasonally adjusted 18% on month in November, the Cabinet Office said on Thursday coming in at 942.7 billion yen, following the 6% slide in October. On a yearly basis, core machine orders climbed 5.3%, following the 6.1% fall in the previous month. Japan producer prices were down 0.1% on month in December, the Bank of Japan said on Thursday, slowing from 0.2% in November. On a yearly basis, producer prices were up 0.9%, up from 0.1% in the previous month.

Global Equities: The US Senate approved a revamp of the US-Mexico-Canada Free Trade Agreement a day after the signing of the Phase 1 trade deal between US and China. The Dow Jones pushed further into record territory.

Indian Economy: India's trade deficit narrowed 22.3% to \$11.25 billion in December 2019 from \$14.49 billion in the same month a year ago. Imports fell 8.8% year-on-year to \$38.61 billion, the 7th straight drop. Exports fell 1.8% year-on-year to \$27.36 billion, the 5th straight annual fall. In April-December, the trade deficit narrowed sharply to \$118.10 billion from \$148.23 billion the same period in the previous fiscal year, the Ministry of Commerce & Industry said in a statement on Wednesday, 15 January 2020. The credit growth of scheduled commercial banks (SCBs) has improved to 7.6% YoY to Rs 10044845 crore as on 03 January 2020, compared with 7.1% growth a fortnight ago. However, the credit growth has decelerated from 14.8% at end January 2019. Non-food credit, accounting for 99.2% of the share of the total credit, recorded a growth of 7.5%, YoY, to Rs 9961343 crore as on 03 January 2020 as against a rise of 7.1% fortnight ago and 13.8% rise a year ago. SEBI has proposed a new set of norms for investment advisers, under which they will have to segregate their advisory and product distribution activities, as part of its effort to strengthen the regulatory framework.

Equity Markets: Key equity market barometers ended with minor gains after a see-saw session on Thursday. Trading was volatile on account of weekly index options expiry on the NSE. Investors booked some profits after the US and China signed a preliminary trade agreement on Wednesday, expectations for which had driven global equities to record highs. The barometer BSE S&P Sensex rose 59.83 points or 0.14% to 41,932.56. The Nifty 50 index gained 12.95 points or 0.09% to 12,356.25.

Corporate News: Telecom stocks will be in focus after Supreme Court, yesterday, 16 January 2020, dismissed the review pleas from telecom companies that sought relief on interest and penalty payments in connection to the verdict on Adjusted Gross Revenue (AGR). The deadline for telecom companies to meet the license fee dues as per the apex court's AGR judgement is 23 January 2020. Index heavyweights Reliance Industries, Tata Consultancy Services, HCL technologies, ICICI Bank will announce their Q3 result today, 17 January 2020. GMR Infrastructure said that the Supreme Court of India has lifted suspension of the environment clearance on GMR Goa International Airport (GGIAL). This in effect will result in resumption of the construction activities at the project site to build a greenfield



international airport at Mopa, Goa, by GGIAL.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	8.9	36.2	40.0
MF(INR cr)	194.1	188.4	272.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,778	35,172	37,198
F&O(INR cr)	1,044,469	1,614,213	1,364,910

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.3	12.9	14.9
NSE VIX	14.2	13.8	16.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,854	0.1 %	5.0 %	Energy	15,974	(0.3) %	(3.4) %
IT	16,382	0.2 %	3.4 %	Pharma	8,203	0.5 %	(12.5) %
Metals	2,885	(1.3) %	(7.0) %	Finance	14,655	0.1 %	17.2 %
Auto	8,396	0.1 %	(0.2) %	PSU	2,466	0.1 %	(27.2) %
FMCG	31,338	0.3 %	3.8 %	Real Estate	324	0.9 %	21.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Page Indus	25,474	4.8 %	(0.2) %	Bandhan Ba	476	(3.3) %	(10.2) %
Eicher Mot	21,536	4.4 %	7.4 %	Oracle Fin	2,881	(2.5) %	(15.0) %
ICICI Lomb	1,415	4.1 %	39.3 %	H P C L	250	(2.2) %	(11.8) %
Nestle Ind	15,355	3.3 %	40.7 %	GAIL (Indi	129	(2.2) %	(27.4) %
Motherson	143	2.9 %	(6.8) %	Godrej Con	747	(2.1) %	10.3 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
International Securities Transactions (Canadian dollar) (NOV)	17-01-2020	19:00	CAD	-	-
Producer & Import Prices (MoM) (DEC)	17-01-2020	13:00	CHF	-	(0.004)
Gross Domestic Product (YoY) (4Q)	17-01-2020	7:30	CNY	-	0.06
Euro-Zone Current Account s.a. (euros) (NOV)	17-01-2020	14:30	EUR	-	-
Euro-Zone Consumer Price Index (YoY) (DEC)	17-01-2020	15:30	EUR	-	0.01
Retail Sales Ex Auto Fuel (YoY) (DEC)	17-01-2020	15:00	GBP	-	0.008
Tertiary Industry Index (MoM) (NOV)	17-01-2020	10:00	JPY	-	(0.046)
Foreign Buying Japan Bonds (JAN 10)	17-01-2020	5:20	JPY	-	-
N.Z. Government 5-Month Financial Statements	17-01-2020	2:30	NZD	-	-
BusinessNZ Manufacturing PMI (DEC)	17-01-2020	3:00	NZD	-	51.4
Fed's Harker Discusses Economic Outlook	17-01-2020	19:30	USD	-	-
Industrial Production (MoM) (DEC)	17-01-2020	19:45	USD	-	0.011
U. of Mich. Sentiment (JAN P)	17-01-2020	20:30	USD	-	99.3
Baker Hughes U.S. Rig Count (JAN 17)	17-01-2020	23:30	USD	-	781

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