



17 Feb.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,113	(0.5) %	3.8 %
BSE SENSEX	41,258	(0.5) %	6.1 %
CNX BANK	30,835	(1.3) %	1.7 %
CNX MIDCAP	17,979	(0.8) %	(1.9) %
CNX SMALLCAP	6,160	(0.3) %	(8.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,398	(0.1) %	3.0 %
S&P 500	3,380	0.2 %	4.6 %
FTSE 100	7,409	(0.6) %	(2.6) %
HANG SENG	27,816	0.3 %	(2.6) %
NIKKEI	23,688	(0.6) %	2.1 %
SHANGHAI COMPOSITE	2,917	0.4 %	(5.5) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.34	0.2 %	0.2 %
EUR/USD	1.08	(0.2) %	(3.4) %
GBP/USD	1.30	0.3 %	(1.1) %
USD/JPY	109.80	(0.0) %	1.1 %
USD/AUD	1.49	0.1 %	4.4 %
USD/SGD	1.39	0.2 %	3.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	1.2 %	(14.9) %
Gold(INR/10g)	40,676	0.1 %	4.3 %
Gold Comex(USD/oz)	1,582	0.5 %	2.5 %
SILVER(INR/1Kg)	45,928	0.2 %	(0.3) %
Aluminium(USD/MT)	1,705	0.2 %	(3.8) %
Copper(USD/MT)	5,737	0.4 %	(6.9) %

**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 University of Michigan released a report on Friday showing a rise in U.S. consumer sentiment in the month of February. Preliminary data showed the consumer sentiment index rose to 100.9% in February from the final January reading of 99.8. Business inventories in the US edged higher in the month of December, according to a report released by the Commerce Department on Friday. The report said business inventories inched up by 0.1% in December after slipping by 0.2% in November. The US Federal Reserve released a report showing a continued decrease in US industrial production. The Fed said industrial production fell by 0.3% in January following a revised decrease of 0.4% in December. The utilities output plunged by 4% in January after tanking by 6.2% in December. European Union's statistics office Eurostat said GDP in the 19 countries sharing the euro expanded 0.1% quarter-on-quarter in the October-December period, for a 0.9% year-on-year gain - a downward revision from the previously estimated 1.0% growth. Germany's gross domestic product was unchanged from the previous quarter on a seasonally and calendar-adjusted basis. The third quarter growth was revised up to 0.2% from 0.1%. On a non-adjusted basis, GDP rose 0.3% year-on-year after a revised 1.1% growth in the third quarter.

**Global Equities:** US stocks saw a choppy movement. European markets also ended mixed as news about the virus outbreak in China weighed on the sentiments.

**Indian Economy:** India's merchandise exports declined 1.7% to US\$ 25.97 billion in January 2020 over a year ago. Meanwhile, merchandise imports fell at slower pace of 0.7% to US\$ 41.14 billion. The trade deficit rose 0.9% to US\$ 15.17 billion in January 2020 from US\$ 14.73 billion in January 2019. The Wholesale Price Index (WPI)-based inflation, base year 2011-12, continued to accelerate higher for third straight month to 9-months high of 3.1% in January 2020, showing further increase from 2.6% in December 2019, 0.6% in November 2019 and 0% in October 2019.

**Equity Markets:** Key benchmark indices ended lower on Friday, dragged by weakness in banks stocks. The barometer S&P BSE Sensex declined 202.05 points or 0.49% at 41,257.74. The Nifty 50 index lost 61.20 points or 0.50% at 12,113.45. Trading was volatile after the Supreme Court (SC) on Friday initiated contempt proceedings against telecom companies for non-payment of Adjusted Gross Revenue (AGR) dues and directed that all directors of the companies be present at the next hearing. The matter will be heard next on March 17.

**Corporate News:** Finolex Cables reported 10.13% jump in net profit to Rs 102.72 crore in Q3 FY20. Profit before tax in Q3 FY20 stood at Rs 135.83 crore, up by 2.64%. Current tax expenses in the December quarter fell sharply by 44.02% year-on-year (YoY) to Rs 24.93 crore. Net sales declined 6.30% to Rs 702.36 crore in the December quarter of FY20. Vodafone Idea said that it has received letters from Department of Telecommunications (DoT) directing immediate payment of the AGR dues. The Company is currently assessing the amount that it will be able to pay to DoT towards the dues and proposes to pay the amount so assessed in the next few days. Local oil marketing companies could be under pressure following a sharp spurt in global crude oil prices. The Brent Crude oil futures jumped 1.76% to break above \$57 per barrel on Friday.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	92.8	230.7	50.4
MF(INR cr)	449.3	65.0	245.1

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	40,488	38,485	37,225
F&O(INR cr)	1,246,566	1,652,259	1,400,880

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.7	15.1	14.9
NSE VIX	13.6	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	30,835	(1.3) %	1.7 %	Energy	15,049	(0.9) %	(9.0) %
IT	16,643	(0.2) %	5.1 %	Pharma	8,332	(0.0) %	(11.1) %
Metals	2,614	(1.4) %	(15.8) %	Finance	14,477	(0.7) %	15.8 %
Auto	7,822	(1.2) %	(7.0) %	PSU	2,211	(2.0) %	(34.7) %
FMCG	30,647	(1.3) %	1.5 %	Real Estate	310	(1.1) %	16.1 %

### 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>
Bharti Air	565	4.6 %	80.6 %	Vodafone I	3	(24.4) %	(80.8) %
Yes Bank	39	4.6 %	(85.9) %	GAIL (Indi	123	(5.9) %	(30.9) %
UPL	592	2.2 %	(5.0) %	Avenue Sup	2,408	(5.3) %	61.3 %
Lupin	718	2.0 %	(6.3) %	General In	218	(4.6) %	(11.5) %
Shriram Tr	1,286	1.9 %	4.1 %	Page Indus	22,447	(4.5) %	(12.1) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
International Securities Transactions (Canadian dollar) (DEC)	17-02-2020	19:00	CAD	-	-
Domestic Sight Deposits CHF (FEB 14)	17-02-2020	14:30	CHF	-	-
New Home Prices (MoM) (JAN)	17-02-2020	7:00	CNY	-	0.0035
Euro-Zone Construction Output s.a. (MoM) (DEC)	17-02-2020	15:30	EUR	-	0.007
Rightmove House Prices (YoY) (FEB)	17-02-2020	5:31	GBP	-	0.027
Industrial Production (YoY) (DEC F)	17-02-2020	10:00	JPY	-	(0.03)
Tokyo Condominium Sales (YoY) (JAN)	17-02-2020	9:30	JPY	-	(0.143)

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