



17 Dec.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,054	0.0 %	3.3 %
BSE SENSEX	40,939	(0.2) %	5.3 %
CNX BANK	31,974	0.0 %	5.4 %
CNX MIDCAP	16,842	0.0 %	(8.1) %
CNX SMALLCAP	5,647	0.0 %	(16.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,236	0.4 %	21.0 %
S&P 500	3,191	0.7 %	27.3 %
FTSE 100	7,519	2.3 %	11.7 %
HANG SENG	27,508	(0.7) %	9.5 %
NIKKEI	23,952	(0.3) %	22.4 %
SHANGHAI COMPOSITE	2,984	0.6 %	21.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.81	0.2 %	2.0 %
EUR/USD	1.11	0.4 %	(2.7) %
GBP/USD	1.34	1.5 %	4.8 %
USD/JPY	109.49	0.7 %	(0.1) %
USD/AUD	1.45	(0.6) %	2.3 %
USD/SGD	1.36	(0.3) %	(0.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	0.0 %	27.2 %
Gold(INR/10g)	37,891	0.5 %	20.2 %
Gold Comex(USD/oz)	17 (98.8) %	(98.7) %	
SILVER(INR/1Kg)	44,128	0.6 %	15.3 %
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: A report released by the National Association of Home Builders on Monday showed a surge in US homebuilder confidence in the month of December. The report said the NAHB/Wells Fargo Housing Market Index spiked to 76 in December from an upwardly revised 71 in November. New York manufacturing activity has grown at a slightly faster rate in the month of December, according to a report released by the Federal Reserve Bank of New York on Monday. The New York Fed said its general business conditions index inched up to 3.5 in December from 2.9 in November, with a positive reading indicating growth. China industrial production expanded at the fastest pace in five months in November. Industrial output grew by 6.2% on a yearly basis in November, faster than the 4.7% increase in the previous month, the National Bureau of Statistics reported Monday. In other data, retail sales growth accelerated to 8% from 7.2% a month ago, recording the fastest increase since June. China's fixed asset investment recorded a steady growth of 5.2% in In January to November period. At the same time, property investment advanced 10.2%, following a 10.3% rise in January to October period. Japan's tertiary industry activity declined in October, data from the Ministry of Economy, Trade and Industry showed on Monday. Tertiary industry activity decreased 4.6% month-on-month in October. Australia private sector fell marginally in December, survey results from IHS Markit and Commonwealth Bank of Australia showed on Monday. The composite output index dropped to 49.4 in December from 49.7 in the preceding month.

Global Equities: US stocks hit fresh records on positive global trade developments. US Trade Representative Robert Lighthizer said on Sunday that the phase one US-China trade deal is totally done and it will nearly double US exports to China over the next two years.

Indian Economy: Wholesale Price Index (WPI)-based inflation, base year 2011-12, rebounded to 3-months high of 0.6% in November 2019, while snapping consistent moderation for last six straight months to 0.2% in October from 3.2% in April 2019. Among the three major sub-groups, the inflation for primary articles and fuel and power increased, while inflation for manufactured products group was steady in November 2019. The core inflation (manufactured products excluding foods products) slipped further down into sub-zero level to (-) 1.9% in November 2019 from (-) 1.6% in October 2019. The WPI inflation is revised slightly upwards to 1.2% for August 2019 from 1.1% reported at provisional level. RBI noted that as announced in the Statement on Developmental and Regulatory Policies dated October 4, 2019, in order to facilitate smooth settlement of NEFT transactions in the accounts of the member banks maintained with the Reserve Bank in a 24x7 environment, it has been decided to provide an additional collateralised intra-day liquidity facility, to be called Liquidity Support (LS).

Equity Markets: Domestic equity market corrected on Monday amid profit booking after a stellar rally in the past three sessions. The Nifty 50 index added 1.93% in the past three days supported by US reaching a trade agreement with China and Boris Johnson's crushing victory in UK election. The barometer index, the BSE Sensex, fell 70.99 points or 0.17% to 40,938.72. The Nifty 50 index slipped 26 points or 0.22% to 12,060.70.

Corporate News: Cipla Ltd has acquired the brand name and trademark rights for Vysov ® & Vysov M® (Vildagliptin + Metformin) of the anti-diabetic drug, Vildagliptin for the Indian market. IT counters could be supported as the Indian Rupee eased yesterday. INR had seen strong gains in last few days on soaring local equities and a tepid undertone in the US dollar. The local currency closed at 71 per US dollar, falling 17 paise on the day.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	16.6	(7.7)	37.4
MF(INR cr)	573.3	615.2	320.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	30,940	35,974	36,859
F&O(INR cr)	862,838	1,396,062	1,351,352

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.0	15.9
NSE VIX	13.4	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	31,974	(0.1) %	5.4 %	Energy	15,974	(0.6) %	(3.4) %
IT	15,349	1.0 %	(3.1) %	Pharma	8,026	(0.2) %	(14.4) %
Metals	2,591	(1.4) %	(16.5) %	Finance	14,418	0.0 %	15.3 %
Auto	7,991	(1.0) %	(5.0) %	PSU	2,555	(0.6) %	(24.5) %
FMCG	30,043	(1.3) %	(0.5) %	Real Estate	289	0.6 %	8.3 %

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>
TCS	2,127	2.7 %	4.7 %	Bandhan Ba	489	(5.0) %	(7.7) %
HCL Techno	552	1.7 %	(0.6) %	Vodafone I	7	(4.3) %	(62.8) %
Tech Mahin	773	1.5 %	(1.6) %	Grasim Ind	763	(2.5) %	(11.0) %
Aurobindo	455	1.3 %	(42.6) %	Adani Port	368	(2.3) %	(3.8) %
GAIL (Indi	121	1.2 %	(31.7) %	New India	134	(2.2) %	(29.3) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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