



17 Dec.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	13,683	0.8 %	65.8 %
BSE SENSEX	46,666	0.9 %	65.1 %
CNX BANK	30,698	0.0 %	68.6 %
CNX MIDCAP	20,906	1.2 %	82.3 %
CNX SMALLCAP	6,962	1.0 %	96.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,155	(0.2) %	5.7 %
S&P 500	3,701	0.2 %	14.6 %
FTSE 100	6,571	0.9 %	(13.6) %
HANG SENG	26,460	1.0 %	(7.3) %
NIKKEI	26,757	0.3 %	15.3 %
SHANGHAI COMPOSITE	3,367	(0.0) %	9.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.49	(0.1) %	3.2 %
EUR/USD	1.21	0.3 %	8.3 %
GBP/USD	1.34	1.0 %	1.3 %
USD/JPY	103.95	(0.2) %	(4.3) %
USD/AUD	1.32	(0.2) %	(7.1) %
USD/SGD	1.33	(0.3) %	(0.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.4 %	(21.8) %
Gold(INR/10g)	49,601	1.0 %	27.2 %
Gold Comex(USD/oz)	1,872	0.6 %	21.3 %
SILVER(INR/1Kg)	65,483	3.8 %	42.2 %
Aluminium(USD/MT)	2,029	0.3 %	14.5 %
Copper(USD/MT)	7,823	0.9 %	26.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.9	0.0 %	(1.0) %

Global Economy: The US Federal Reserve left its benchmark rate unchanged in the range of 0% to 0.25% and stated that the ultra-low rate environment will continue for some time, with policymakers backing rates to remain unchanged through 2023. The Fed's interest-rate outlook for 2020 through 2023 was 0.1%, unchanged from previous projections in September, the Fed's Summary of Economic Projections showed. The economy is expected to contract by 2.4% in 2020, up from an estimate for 3.7% contraction previously. For 2021, the Fed expects the economy to grow by 4.2%, and 3.2% in 2022, up from previous estimates of 4% and 3% respectively. Euro area private sector moved close to stabilization in December as stronger manufacturing output growth helped to counter a further drop in service sector activity, flash survey results from IHS Markit showed Wednesday. The composite output index advanced more-than-expected to 49.8 in December from 45.3 in the previous month. Germany's private sector expanded again in December with the strength in manufacturing continuing to offset service sector weakness, survey results from IHS Markit revealed Wednesday. The flash composite output index climbed unexpectedly to 52.5 from 51.7 in November. UK private sector output recovered in December driven by another solid increase in the manufacturing sector, flash survey data from IHS Markit showed Wednesday. The IHS Markit/Chartered Institute of Procurement & Supply composite output index rose to 50.7 in December from 49.0 in November.

Global Equities: US stocks saw a sideways action as traders focused on the stimulus. Covid-19 scenario remained tense despite the rollout of the vaccine in the US.

Indian Economy: Based on better than expected economic recovery, the State Bank Of India (SBI), in its latest research update Ecowrap, stated that India's FY21 Gross Domestic Product (GDP) is estimated at -7.4% as compared to earlier estimate at -10.9%. The estimates are based on a Nowcasting Model with 41 high frequency indicators. The research update further stated that GDP is estimated to grow by around 11% due to base effect primarily. India's overall exports (Merchandise and Services combined) in April-November 2020-21 are estimated to be USD 304.25 Billion, exhibiting a negative growth of (-) 14.03% over the same period last year. Overall imports in April-November 2020-21 are estimated to be USD 290.66 Billion, exhibiting a negative growth of (-) 29.96% over the same period last year. Exports in November 2020 were USD 23.52 Billion, as compared to USD 25.77 Billion in November 2019, exhibiting a negative growth of (-) 8.74%. Imports in November 2020 were USD 33.39 Billion (Rs.2,47,839.85 Crore), which is a decline of (-) 13.32% in Dollar terms.

Equity Markets: The domestic equity benchmarks ended the session near the day's high on Wednesday, mirroring positive global shares. Barring the Nifty PSU Bank index, all the sectoral indices on the NSE ended in the green. The S&P BSE Sensex, jumped 403.29 points or 0.87% at 46,666.46. The Nifty 50 index advanced 114.85 points or 0.85% at 13,682.70. Both the indices attained record closing high levels. The Sensex hit a record high of 46,704.97 and the Nifty hit a record high of 13,692.35 in late trade.

Corporate News: Wipro has completed the acquisition of 83.4% equity stake in Encore Theme. Sugar stocks will be watched as the Cabinet approved Rs 3,500 crore subsidy for sugar farmers and Rs 6,000 per tonne subsidy for sugar exports to be given for 60 lakh tonnes of sugar exports. Aster DM Healthcare, through its subsidiary, Aster DM Healthcare FZC, has acquired a company in the Grand Cayman, Cayman Islands - Aster Caribbean Holdings Ltd.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	313.8	432.9	157.9
MF(INR cr)	52.3	(1,326.2)	(471.8)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	66,413	69,516	58,313
F&O(INR cr)	2,587,753	2,674,527	2,007,281

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.8	21.8	29.3
NSE VIX	19.2	19.0	26.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,698	0.0 %	68.6 %	Energy	17,383	0.6 %	61.4 %
IT	22,906	0.8 %	90.2 %	Pharma	12,548	0.9 %	78.6 %
Metals	3,272	1.8 %	110.6 %	Finance	14,789	0.8 %	65.4 %
Auto	9,239	1.0 %	98.4 %	PSU	1,804	(1.6) %	40.6 %
FMCG	34,196	0.7 %	29.7 %	Real Estate	304	5.1 %	76.6 %

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>
DLF	235	9.7 %	77.6 %	Punjab Nat	38	(6.5) %	24.6 %
Havells In	901	4.2 %	86.0 %	P & G Hygi	11,206	(1.5) %	7.6 %
H D F C	2,425	3.2 %	53.1 %	Container	408	(1.2) %	28.5 %
Hindalco I	251	2.8 %	174.4 %	Bank of Ba	66	(1.1) %	29.6 %
HDFC AMC	2,863	2.6 %	31.0 %	ICICI Bank	512	(1.1) %	64.7 %

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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