



18 Jan.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,434	(1.1) %	74.9 %
BSE SENSEX	49,035	(1.1) %	73.5 %
CNX BANK	32,247	(0.8) %	77.1 %
CNX MIDCAP	21,934	(1.1) %	91.2 %
CNX SMALLCAP	7,402	(1.1) %	109.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,814	(0.6) %	0.7 %
S&P 500	3,768	(0.7) %	0.3 %
FTSE 100	6,736	(1.0) %	2.5 %
HANG SENG	28,574	0.3 %	4.0 %
NIKKEI	28,519	(0.6) %	4.6 %
SHANGHAI COMPOSITE	3,566	0.0 %	1.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.07	(0.1) %	0.2 %
EUR/USD	1.21	(0.3) %	(0.9) %
GBP/USD	1.37	(0.0) %	0.1 %
USD/JPY	103.93	0.1 %	0.7 %
USD/AUD	1.29	(0.2) %	(0.7) %
USD/SGD	1.33	0.1 %	0.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(2.3) %	10.0 %
Gold(INR/10g)	49,285	0.0 %	(3.4) %
Gold Comex(USD/oz)	1,828	(1.3) %	(6.2) %
SILVER(INR/1Kg)	65,174	0.0 %	(5.4) %
Aluminium(USD/MT)	2,001	(0.5) %	(0.6) %
Copper(USD/MT)	7,980	(0.3) %	0.8 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.1	(0.0) %	0.2 %

Global Economy: Preliminary data released by the University of Michigan on Friday showed a modest deterioration in US consumer sentiment in the month of January. The report said the consumer sentiment index dipped to 79.2 in January after jumping to 80.7 in December. The Commerce Department said retail sales eased by 0.7% in December after tumbling by a revised 1.4% in November. The New York Fed said its general business conditions index slipped to 3.5 in January from 4.9 in December, although a positive reading still indicates growth in regional manufacturing activity. The US business inventories rose by 0.5% in November after climbing by an upwardly revised 0.8% in October. The UK economy contracted in November, data released by the Office for National Statistics revealed Friday. Gross domestic product contracted 2.6% on month in November but slower than the 5.7%. The decline reversed a 0.6% rise posted in October. The economy contracted in November after rising for six straight months. November GDP fell back to 8.5% below the levels seen in February 2020. GDP fell 8.9% in the twelve months to November. Japan's tertiary activity fell for the sixth month in a row in November, data from the Ministry of Economy, Trade and Industry showed on Friday. The tertiary activity index declined 0.7% month-on-month in November, after a 1.6% increase in October. On a yearly basis, the tertiary activity index declined 3.7% in November, following a 1.4% fall in the previous month.

Global Equities: US stocks eased as a slide from all-time highs extended in cautious trades. Worries over earnings and a tepid US retail sales data weighed.

Indian Economy: Agriculture Ministry data showed that acreage under rabi crop stood at 652 lakh hectares (ha) as on 15th 2021 against 642 lakh ha during the corresponding period of last year, marking an increase of 10 lakh ha or 1.56%. Sowing reported under Wheat was at 337 lakh ha against 330 lakh ha area of last year i.e. increase in area coverage by 6.55 lakh ha or 2%. Prime Minister Narendra Modi launched the pan India rollout of COVID-19 vaccination drive on 16th January, 2021. This is the world's largest vaccination program covering the entire length and breadth of the country. India's overall exports in April-December 2020-21 are estimated to be USD 348.49 Billion, exhibiting a negative growth of (-)12.65% over the same period last year. Overall imports in April-December 2020-21 are estimated to be USD 343.27 Billion, exhibiting a negative growth of (-) 25.86% over the same period last year.

Equity Markets: The domestic equity market corrected sharply on Friday, led by broader selling pressure. IT, pharma and PSU banks declined sharply. Rising coronavirus cases across US, Europe and China weighed on investors' sentiment.

Corporate News: Banking Stocks will be in focus as the RBI said the bank loan growth hit 9-month high of 6.7% for the week ended January 1. As per RBI Data, bank credit growth was last at 6.8% in April 2020. Wipro can see some buying as Fiat Chrysler Automobiles partnered with Wipro to establish its first Global Digital Hub in India. HDFC Bank said that after providing Rs 3,013.6 crore for taxation, the bank earned a net profit of Rs 8,758.3 crore for the quarter ended December 2020, an increase of 18.1% over the quarter ended December 2019. Net interest income - interest earned less interest expended - for the quarter ended December 2020 grew by 15.1% to Rs 16,317.6 crore from Rs 14,172.9 crore in the corresponding period,



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	220.4	244.0	166.2
MF(INR cr)	(1,309.9)	(1,251.6)	(541.2)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	80,325	70,868	59,188
F&O(INR cr)	2,275,797	3,226,633	2,150,537

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.3	23.9	28.8
NSE VIX	24.0	21.6	26.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,247	(0.8) %	77.1 %	Energy	17,341	(1.9) %	61.0 %
IT	26,363	(2.2) %	118.9 %	Pharma	13,014	(1.6) %	85.2 %
Metals	3,449	(1.1) %	122.0 %	Finance	15,453	(1.0) %	72.8 %
Auto	10,178	(0.6) %	118.5 %	PSU	1,937	(2.1) %	51.0 %
FMCG	34,630	(0.7) %	31.4 %	Real Estate	331	(1.8) %	92.5 %

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>
Tata Motor	260	6.2 %	283.1 %	Tech Mahin	1,007	(4.3) %	97.0 %
Bharti Air	603	3.8 %	43.0 %	Muthoot Fi	1,203	(3.8) %	99.0 %
UPL	523	2.6 %	70.9 %	GAIL (Indi	139	(3.8) %	82.8 %
Indus Towe	262	2.5 %	69.1 %	HCL Techno	990	(3.7) %	139.3 %
Piramal En	1,625	1.8 %	73.5 %	Indraprast	548	(3.5) %	40.3 %

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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