



18 Dec.2019

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|-------|----------|
| CNX NIFTY | 12,180 | 0.1 % | 4.4 % |
| BSE SENSEX | 41,352 | 1.0 % | 6.5 % |
| CNX BANK | 32,187 | 0.1 % | 6.1 % |
| CNX MIDCAP | 16,962 | 0.1 % | (7.5) % |
| CNX SMALLCAP | 5,705 | 0.3 % | (15.3) % |
| GLOBAL INDICES | LATEST | % 1D | % YTD |
| DOW JONES | 28,267 | 0.1 % | 21.2 % |
| S&P 500 | 3,193 | 0.0 % | 27.4 % |
| FTSE 100 | 7,525 | 0.1 % | 11.7 % |
| HANG SENG | 27,844 | 1.2 % | 10.8 % |
| NIKKEI | 24,066 | 0.5 % | 23.0 % |
| SHANGHAI COMPOSITE | 3,022 | 1.3 % | 22.6 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 70.90 | 0.5 % | 2.1 % |
| EUR/USD | 1.11 | 0.1 % | (2.6) % |
| GBP/USD | 1.32 | (0.0) % | 3.5 % |
| USD/JPY | 109.55 | 0.6 % | (0.1) % |
| USD/AUD | 1.46 | 0.5 % | 2.7 % |
| USD/SGD | 1.36 | (0.1) % | (0.7) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 60 | 0.0 % | 29.4 % |
| Gold(INR/10g) | 37,936 | 0.1 % | 20.3 % |
| Gold Comex(USD/oz) | 1,474 | 0.0 % | 14.2 % |
| SILVER(INR/1Kg) | 44,199 | 0.2 % | 15.5 % |
| Aluminium(USD/MT) | 1,754 | (0.5) % | (5.6) % |
| Copper(USD/MT) | 6,175 | 0.3 % | 5.8 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 1.9 | 0.0 % | (0.7) % |

Global Economy: The US Federal Reserve released a report on Tuesday showing US industrial production rebounded in November. The industrial production spiked by 1.1% in November after tumbling by a revised 0.9 percent in October. The US housing starts surged up by 3.2% to an annual rate of 1.365 million in November after spiking by 4.5% in October. Housing starts rose for the second straight month following a sharp pullback in September, rising back near the twelve-year high of 1.375 million set in August. Building permits, an indicator of future housing demand, also rose by 1.4% to an annual rate of 1.482 million in November after soaring by 5% to a rate of 1.461 million in October. Europe's passenger car sales increased for the third straight month in November. New passenger car sales grew 4.9% on a yearly basis in November. However, the pace of increase slowed from 8.7% in October. UK unemployment rate remained unchanged in three months to October. The unemployment rate was largely unchanged at 3.8%. The number of people out of work decreased by 93,000 to 1.28 million in the year to October. At the same time, the number of employed persons increased by 24,000 to 32.8 million in three months to October, with the employment rate reaching a record high of 76.2%. Singapore's non-oil domestic exports declined at a slower rate in November, data from Enterprise Singapore showed on Tuesday. Non-oil domestic exports decreased 5.9% year-on-year in November, following a 12.5% decline in October.

Global Equities: European markets eased on modest profit selling. Prospect of a hard Brexit weighed on the sentiments after recent surge in the markets.

Indian Economy: International Energy Agency noted that Coal still fuels India's robust economic growth. Although India has succeeded in bringing some form of electricity access to almost all of its citizens, the country's per capita power consumption is still low, giving it significant scope to grow. Power generation from renewables is forecast to expand strongly, with wind capacity doubling and solar photovoltaics (PV) increasing fourfold between 2018 and 2024. But that is not enough to prevent coal power generation increasing by 4.6% per year through 2024. Industry body FICCI has urged the government for income tax relief in the upcoming budget as a means to spur overall demand for goods and services, and said it should announce measures to re-energise exports, incentivise employment and reduce cost of doing business in the country. The government should consider revising upwards the direct income tax slabs for individuals with highest tax rate of 30% applicable only for income above Rs. 20 lakh, FICCI said in its pre-budget memorandum.

Equity Markets: Sensex and the Nifty ended with strong gains after hitting all-time highs on Tuesday. IT and metal shares were in demand while the Nifty Bank index hit a record high. Positive global sentiments buoyed by easing trade war tensions between the US and China pushed domestic shares higher.

Corporate News: Tata Consultancy Services (TCS) has been selected by Petco, America's leading pet specialty retailer, to deploy TCS Optumera, an AI-powered merchandise optimization suite. Prestige Estates Projects informed that the meeting of the board of directors of the company is scheduled on 20 December 2019 to consider and approve raising of funds through preferential issue to an identified allottee. Goodyear India informed that the company has decided to close its manufacturing operations of the Plant situated at Ballabgarh, (District-Faridabad) Haryana, from December 21, 2019 to December 30, 2019 (both days inclusive) to align production in line with the market demand.



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) | 38,546 | 36,188 | 36,868 |
| F&O(INR cr) | 999,956 | 1,363,053 | 1,349,332 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 17.0 | 17.0 | 15.9 |
| NSE VIX | 12.5 | 13.7 | 16.8 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 32,140 | 0.5 % | 6.0 % | Energy | 15,976 | 0.0 % | (3.4) % |
| IT | 15,637 | 1.9 % | (1.3) % | Pharma | 8,000 | (0.3) % | (14.7) % |
| Metals | 2,666 | 2.9 % | (14.1) % | Finance | 14,555 | 0.9 % | 16.4 % |
| Auto | 8,040 | 0.6 % | (4.5) % | PSU | 2,567 | 0.5 % | (24.2) % |
| FMCG | 30,182 | 0.5 % | (0.0) % | Real Estate | 289 | (0.3) % | 8.0 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Avenue Sup | 1,884 | 6.4 % | 26.2 % | Bandhan Ba | 480 | (1.9) % | (9.5) % |
| Vodafone I | 7 | 4.5 % | (61.1) % | Biocon | 291 | (1.6) % | (6.1) % |
| Tata Steel | 439 | 4.4 % | (17.9) % | Indiabulls | 305 | (1.5) % | (64.0) % |
| Bharti Air | 440 | 4.3 % | 40.6 % | Sun Pharma | 429 | (1.4) % | (10.4) % |
| Tata Motor | 76 | 3.8 % | (18.2) % | Aurobindo | 449 | (1.4) % | (43.4) % |

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 | | | | | |

..... End of Report