



18 Dec.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	13,741	0.4 %	66.5 %
BSE SENSEX	46,890	0.5 %	65.9 %
CNX BANK	30,847	0.5 %	69.4 %
CNX MIDCAP	20,849	(0.3) %	81.8 %
CNX SMALLCAP	6,973	0.1 %	96.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,303	0.5 %	6.2 %
S&P 500	3,722	0.6 %	15.2 %
FTSE 100	6,551	(0.3) %	(13.9) %
HANG SENG	26,678	0.8 %	(6.5) %
NIKKEI	26,807	0.2 %	15.5 %
SHANGHAI COMPOSITE	3,405	1.1 %	10.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.45	(0.1) %	3.2 %
EUR/USD	1.22	0.3 %	8.6 %
GBP/USD	1.35	1.0 %	2.3 %
USD/JPY	103.51	(0.4) %	(4.7) %
USD/AUD	1.32	(0.2) %	(7.3) %
USD/SGD	1.33	(0.3) %	(1.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.4 %	(21.8) %
Gold(INR/10g)	49,790	0.4 %	27.7 %
Gold Comex(USD/oz)	1,872	0.6 %	21.3 %
SILVER(INR/1Kg)	66,327	1.3 %	44.0 %
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 Commerce Department said housing starts jumped by 1.2% to an annual rate of 1.547 million in November from a revised October rate of 1.528 million. The US Philly Fed Index tumbled to 11.1 in December after falling to 26.3 in November. The US initial jobless claims rose to 885,000, an increase of 23,000 from the previous week's revised level of 862,000. With this increase, jobless claims climbed to their highest level since hitting 893,000 in the week ended September 5th. Eurozone consumer prices were down 0.3% on a yearly basis in November, the same rate of fall as seen in October and in line with the preliminary estimate published on December 1, final data from Eurostat revealed Thursday. Core inflation, which excludes prices of energy, food, alcohol and tobacco, held steady at 0.2% in October. Europe's new car registrations saw a sharp plunge in November as several European governments introduced new measures to contain the second wave of the Covid-19 pandemic, the European Automobile Manufacturers Association reported Thursday. New car sales fell 12% year-on-year in November after easing 7.8% in October. During January to November, the EU passenger car market contracted 25.5% to around 9 million units.

Global Equities: US stocks were well supported as the S&P 500 and the Nasdaq hit record highs on Thursday on increased optimism over a coronavirus stimulus bill.

Indian Economy: Union Finance Minister Nirmala Sitharaman said on Thursday that the government has taken several measures to support the economy but no amount of intervention will be adequate to deal with the crisis triggered by the COVID-19 pandemic. Addressing the annual general meeting of the Indian Chamber of Commerce (ICC), Sitharaman said that while in early 2020 green shoots and revival signs of the economy were visible, it was upset with the pandemic setting in. The average annual household income in India is expected to rise to around Rs 7.3 lakh by 2030, nearly 40% higher than it is today but 7-8% lower than pre-COVID estimate, Boston Consulting Group stated in a latest update.

Equity Markets: Domestic equity benchmarks came off record high levels in late trade and ended with decent gains on Thursday. Strength in financial stocks offset losses in IT, FMCG and auto shares. The barometer index, the S&P BSE Sensex, added 223.88 points or 0.48% to 46,890.34. The Nifty 50 index advanced 58 points or 0.42% to 13,740.70. Both the indices attained record closing high levels. The S&P BSE Sensex hit a record high of 46,992.57 while the Nifty hit a record high of 13,773.25 in afternoon trade.

Corporate News: TCS will be in focus as the company's Rs 16,000-crore share buyback offer opens on December 18. GSK Consumer Healthcare on Thursday said it has forayed into the nasal wash segment in the country with the launch of Otrivin Breathe Clean. Petroleum Minister Dharmendra Pradhan on Thursday said the government has planned a \$60-billion investment for creating gas infrastructure in the country till 2024, and gas' share in the energy mix is expected to rise to 15% by 2030.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	274.3	419.6	158.5
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)	62,791	68,998	58,338
F&O(INR cr)	4,887,817	2,844,780	2,023,374

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	26.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,847	0.5 %	69.4 %	Energy	17,324	(0.3) %	60.8 %
IT	22,892	(0.1) %	90.0 %	Pharma	12,602	0.4 %	79.4 %
Metals	3,228	(1.3) %	107.8 %	Finance	14,964	1.2 %	67.3 %
Auto	9,185	(0.6) %	97.2 %	PSU	1,778	(1.4) %	38.6 %
FMCG	34,014	(0.5) %	29.0 %	Real Estate	306	0.6 %	77.6 %

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>
Berger Pai	710	2.9 %	46.8 %	Bank of Ba	64	(3.9) %	24.5 %
HD F C	2,495	2.9 %	57.5 %	Avenue Sup	2,556	(2.7) %	22.7 %
Divi's Lab	3,825	2.9 %	103.8 %	Punjab Nat	37	(2.5) %	21.5 %
General In	145	2.8 %	38.0 %	Hindalco I	246	(2.2) %	168.2 %
Bajaj Fina	5,287	2.7 %	138.2 %	H P C L	226	(2.0) %	22.8 %

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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