



19 Feb.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,087	0.8 %	3.6 %
BSE SENSEX	40,894	(0.4) %	6.1 %
CNX BANK	30,855	1.0 %	1.7 %
CNX MIDCAP	17,907	1.0 %	(2.3) %
CNX SMALLCAP	6,118	1.0 %	(9.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,232	(0.6) %	2.4 %
S&P 500	3,370	(0.3) %	4.3 %
FTSE 100	7,382	(0.7) %	(2.9) %
HANG SENG	27,530	(1.5) %	(3.6) %
NIKKEI	23,194	(1.4) %	(0.0) %
SHANGHAI COMPOSITE	2,985	0.1 %	(3.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.39	0.1 %	0.3 %
EUR/USD	1.08	(0.2) %	(3.6) %
GBP/USD	1.30	(0.2) %	(1.4) %
USD/JPY	109.80	0.0 %	1.1 %
USD/AUD	1.50	0.5 %	4.9 %
USD/SGD	1.39	0.1 %	3.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	0.0 %	(14.9) %
Gold(INR/10g)	40,976	0.6 %	5.1 %
Gold Comex(USD/oz)	1,601	1.2 %	3.8 %
SILVER(INR/1Kg)	46,433	0.7 %	0.8 %
Aluminium(USD/MT)	1,681	0.1 %	(5.1) %
Copper(USD/MT)	5,728	(1.3) %	(7.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.6	(0.0) %	(0.4) %

Global Economy: The New York Fed said its general business conditions index climbed to 12.9 in February from 4.8 in January, with a positive reading indicating growth in regional manufacturing activity. Europe's passenger car sales dropped in January, data from the European Automobile Manufacturers' Association (ACEA), showed on Tuesday. Passenger car registrations contracted 7.5% year-on-year in January to 956,779 units. The ACEA said major changes in taxation was announced by some EU member states for 2020 that pulled registrations forward in December and led to the decline in January. Car sales dropped 13.4% year-on-year in France and by 7.3% in Germany. Germany's economy is set to remain sluggish in the first quarter of 2020, hurt by weak demand for exports and the supply disruptions caused by the Covid-19 outbreak in China, Bundesbank said in its latest monthly report, released on Monday. A pick up in the growth momentum in the biggest euro area economy is unlikely in the first quarter, the bank said. Further, the coronavirus outbreak in China is a fresh risk for the German growth outlook, the bank added. Germany's investor confidence indicator slumped to 8.7 in February from 26.7 in January, survey results from the ZEW - Leibniz Centre for European Economic Research revealed. Economic sentiment logged a steep fall in February as investors increasingly grew concerned about the impact of the coronavirus outbreak in China, results of a closely watched survey showed on Tuesday. The latest score was the weakest since November, when it was -2.1. UK's Office for National Statistics showed that unemployment rate was stable at 3.8% in the October to December period, in line with the reading for the three months to November. It was, marginally lower than the previous quarter. Average weekly earnings growth slowed to 2.9% for total pay, which includes bonuses, from 3.2% the month before. Ratings Agency Moody's has trimmed economic growth forecast for the Asia-Pacific (APAC) region to 5.2% for 2020 citing the lingering impact of the coronavirus outbreak in China, media reports noted.

Global Equities: Stocks mostly slipped as revenue warning from iPhone maker Apple Inc made investors concerned about the impact of the coronavirus outbreak on global economy.

Equity Markets: Key market barometers declined for the fourth straight session on Tuesday, dragged by banking stocks which have significant exposure to telecom sector debts. Weak global shares owing to coronavirus outbreak also impacted trading sentiment. The barometer index, the S&P BSE Sensex fell 161.31 points or 0.39% at 40,894.38. The index recovered after falling as much as 444.74 points to hit the day's low of 40,610.95 in afternoon trade. The Nifty 50 index lost 53.30 points or 0.44% at 11,992.50. The index fell 137.75 points at the day's low of 11,908.05.

Indian Economy: According to 2nd Advance Estimates of production of major crops for 2019-20, cumulative rainfall in the country during the monsoon season (June to September, 2019) has been 10% higher than Long Period Average (LPA). Accordingly, the production of most of the crops for the agricultural year 2019-20 has been estimated higher than their normal production. These estimates are subject to revision on account of more precise information flowing over the time. Total Foodgrain production in the country is estimated at record 291.95 million tonnes which is higher by 6.74 million tonnes than the production of foodgrain of 285.21 million tonnes achieved during 2018-19.

Corporate News: Shree Cement will replace private lender Yes Bank in the benchmark index Nifty 50 from 27 March 2020. Infosys announced a long-term strategic partnership with GE Appliance, a Haier company, to effectively streamline IT operations. As an IT services partner, Infosys will help GE Appliances modernize its IT infrastructure and run IT in managed services mode as part of the overall innovation and optimization agenda. Avenue Supermarts said the promoters of the company sold 1,48,00,000 share constituting 2.28 % of the paid-up capital to the public via offer for sale. Promoter holding in the company now stands at 74.99% of the total paid-up capital.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	24.3	176.4	49.4
MF(INR cr)	192.1	48.3	241.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	40,718	38,394	37,231
F&O(INR cr)	1,489,668	1,595,429	1,399,802

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.8	15.0	14.9
NSE VIX	14.5	0	0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,563	(0.4) %	0.8 %	Energy	14,790	(0.2) %	(10.5) %
IT	16,749	0.6 %	5.7 %	Pharma	8,198	(0.1) %	(12.6) %
Metals	2,556	(1.2) %	(17.6) %	Finance	14,316	(0.4) %	14.5 %
Auto	7,692	(1.0) %	(8.6) %	PSU	2,128	(0.8) %	(37.1) %
FMCG	30,361	(0.4) %	0.6 %	Real Estate	303	(0.9) %	13.3 %

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>
United Spi	722	3.1 %	31.4 %	Vodafone I	3	(11.8) %	(83.1) %
Zee Entert	246	2.7 %	(43.1) %	Bharti Inf	210	(10.6) %	(33.2) %
Coal India	172	2.4 %	(27.3) %	NMDC	99	(6.5) %	(5.7) %
B P C L	471	2.0 %	20.1 %	Yes Bank	35	(5.7) %	(87.3) %
Petronet L	260	1.6 %	5.0 %	Tata Motor	162	(4.4) %	(13.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Westpac Leading Index (MoM) (JAN)	19-02-2020	5:00	AUD	-	0.001
Skilled Vacancies (MoM) (JAN)	19-02-2020	5:30	AUD	-	0.006
Wage Price Index (YoY) (4Q)	19-02-2020	6:00	AUD	-	0.022
Consumer Price Index (YoY) (JAN)	19-02-2020	19:00	CAD	-	0.022
Euro-Zone Current Account s.a. (euros) (DEC)	19-02-2020	14:30	EUR	-	-
Consumer Price Index (YoY) (JAN)	19-02-2020	15:00	GBP	-	0.013
Machine Orders (YoY) (DEC)	19-02-2020	5:20	JPY	-	0.053
MBA Mortgage Applications (FEB 14)	19-02-2020	17:30	USD	-	0.011
Fed's Bostic Speaks on U.S. Economic Outlook in Atlanta	19-02-2020	18:40	USD	-	-
Net Long-term TIC Flows (DEC)	19-02-2020	2:30	USD	-	-
Fed's Kashkari Speaks in Mankato, Minnesota	19-02-2020	22:15	USD	-	-

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