



19 Dec.2019

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|----------|
| CNX NIFTY | 12,202 | (0.2) % | 4.6 % |
| BSE SENSEX | 41,559 | 0.5 % | 6.7 % |
| CNX BANK | 32,104 | (0.4) % | 5.9 % |
| CNX MIDCAP | 16,858 | (0.2) % | (8.0) % |
| CNX SMALLCAP | 5,685 | (0.1) % | (15.6) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| DOW JONES | 28,239 | (0.1) % | 21.1 % |
| S&P 500 | 3,191 | (0.0) % | 27.3 % |
| FTSE 100 | 7,541 | 0.2 % | 12.0 % |
| HANG SENG | 27,884 | 0.2 % | 11.0 % |
| NIKKEI | 23,934 | (0.6) % | 22.4 % |
| SHANGHAI COMPOSITE | 3,017 | (0.2) % | 22.4 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 70.95 | 0.2 % | 2.2 % |
| EUR/USD | 1.11 | (0.1) % | (2.8) % |
| GBP/USD | 1.31 | (2.0) % | 2.7 % |
| USD/JPY | 109.52 | 0.0 % | (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) | 61 | (0.0) % | 30.9 % |
| Gold(INR/10g) | 37,955 | 0.1 % | 20.4 % |
| Gold Comex(USD/oz) | 1,474 | 0.0 % | 14.2 % |
| SILVER(INR/1Kg) | 44,183 | (0.0) % | 15.5 % |
| Aluminium(USD/MT) | 1,758 | 0.2 % | (5.4) % |
| Copper(USD/MT) | 6,127 | (0.8) % | 4.9 % |

FIXED INCOME

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

Global Economy: Donald Trump became the third US president to be impeached on Wednesday. The House of Representatives formally charged him with abuse of power. China's central bank reduced its 14-day reverse repurchase rate marginally on Wednesday after cutting the short-term 7-day repo rate a month ago. The People's Bank of China, on Wednesday, lowered its rate on 14-day reverse repo agreement to 2.65% from 2.7%. The central bank also injected CNY 200 billion into the financial system via reverse repurchase agreements. German business confidence index rose to 96.3 in December from November's initially estimated 95.0, reports said citing survey data from IFO institute on Wednesday. Current assessment as well as expectations strengthened in December. The indicator for current situation climbed to 98.8 and that for expectations increased to 93.8. Japan's exports decreased for the 12th consecutive month in November, official data showed Wednesday. Exports fell 7.9% on a yearly basis in November, the Ministry of Finance reported. At the same time, imports fell 15.7% annually. Consequently, the trade deficit totaled JPY 82.1 billion compared to the forecast of JPY 350 billion. Australia's leading index, which indicates the likely pace of economic activity relative to trend three to nine months into the future, fell to -0.81% in November from -0.78% in October, the Westpac reported Wednesday. The index continued to signal weak economic momentum carrying well into 2020.

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: Nasscom has submitted its pre-budget wish list to the government ahead of the Union Budget 2020. Nasscom is asking for tax cuts, a deep tech fund and extension of the sunset clause provided to the sector. For the IT industry to thrive and be more competitive, the government should extend the corporate tax rate of 15% to new services companies in SEZ as well, according to NASSCOM. According to Indian Sugar Mills Association (ISMA), as on 15th December, 2019, 406 sugar mills were crushing sugarcane for the year 2019-20 SS and they have produced 45.81 lakh tons of sugar, i.e. 35% less than the sugar production on the corresponding date of previous sugar season, of 70.54 lac tons of sugar. Last year on the corresponding date, 473 mills were operating.

Equity Markets: Key equity benchmarks closed at record high levels for second session in a row on Wednesday. Strong inflows from foreign institutional investors (FIIs) in the past few sessions improved trading sentiment. Gains in index majors Reliance Industries, HDFC twins and ITC pushed the benchmarks higher. Pharma stocks advanced while PSU banks corrected. Most Tata Group stocks declined after NCLAT restored Cyrus Mistry as executive chairman of Tata Group.

Corporate News: NMDC said the company has received from Approval for Modified Mining Plan of Kumaraswamy Iron Ore Mines of NMDC from 7 MTPA (7-Million Tonnes per Annum) to 10 MTPA (10-Million Tonnes per Annum) from the Indian Bureau of Mines (IBM), Ministry of Mines, Government of India. Piramal Enterprises said it has fixed 31 December as a record date for right issue. It has fixed rights entitlement ratio as 11 (Eleven) Equity Share for every 83 (Eighty Three) fully paid-up Equity Shares held as on the Record Date by the Eligible Equity Shareholders of the Company and the holders of CCDs who may participate in the Issue. Rights issue is fixed at Rs 1,300 per Equity Share (including a premium of Rs. 1,298 per Equity Share).



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 170.9 | 18.0 | 38.6 |
| 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) | 38,992 | 36,404 | 36,880 |
| F&O(INR cr) | 1,335,544 | 1,360,937 | 1,349,254 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 17.0 | 17.0 | 15.9 |
| NSE VIX | 12.3 | 13.6 | 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 | 32,244 | 0.3 % | 6.3 % | Energy | 15,957 | (0.1) % | (3.5) % |
| IT | 15,711 | 0.5 % | (0.8) % | Pharma | 8,091 | 1.1 % | (13.7) % |
| Metals | 2,688 | 0.8 % | (13.4) % | Finance | 14,619 | 0.4 % | 17.0 % |
| Auto | 8,082 | 0.5 % | (3.9) % | PSU | 2,513 | (2.1) % | (25.8) % |
| FMCG | 30,291 | 0.4 % | 0.3 % | Real Estate | 291 | 0.7 % | 8.7 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| New India | 142 | 6.1 % | (25.0) % | Vodafone I | 6 | (7.2) % | (63.9) % |
| Bandhan Ba | 500 | 4.2 % | (5.7) % | Tata Motor | 73 | (3.5) % | (21.1) % |
| Motherson | 147 | 3.5 % | (4.3) % | Bank of Ba | 99 | (3.2) % | (25.5) % |
| M & M | 523 | 3.3 % | (20.9) % | Tata Motor | 175 | (3.0) % | (6.7) % |
| Marico | 339 | 2.8 % | (2.6) % | Punjab Nat | 63 | (2.3) % | (35.2) % |

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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