



20 Jan.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,352	(0.0) %	5.9 %
BSE SENSEX	41,945	0.0 %	7.9 %
CNX BANK	31,591	(0.8) %	4.2 %
CNX MIDCAP	18,074	0.5 %	(1.4) %
CNX SMALLCAP	6,288	0.3 %	(6.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,348	0.2 %	2.8 %
S&P 500	3,330	0.4 %	3.1 %
FTSE 100	7,675	0.9 %	0.9 %
HANG SENG	29,056	0.6 %	1.8 %
NIKKEI	24,041	0.5 %	3.6 %
SHANGHAI COMPOSITE	3,076	0.1 %	(0.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.92	0.2 %	(0.4) %
EUR/USD	1.11	(0.3) %	(0.9) %
GBP/USD	1.30	(0.1) %	(1.0) %
USD/JPY	110.18	0.1 %	1.4 %
USD/AUD	1.45	0.3 %	1.8 %
USD/SGD	1.35	0.0 %	0.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	0.0 %	(4.3) %
Gold(INR/10g)	39,804	0.2 %	2.1 %
Gold Comex(USD/oz)	1,558	0.3 %	1.0 %
SILVER(INR/1Kg)	46,527	0.5 %	1.0 %
Aluminium(USD/MT)	1,796	0.1 %	1.4 %
Copper(USD/MT)	6,277	(0.4) %	1.8 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.8	0.0 %	(0.1) %

Global Economy: University of Michigan on Friday showed a slight deterioration in U.S. consumer sentiment in the month of January. Preliminary data showed the consumer sentiment index edged down to 99.1 in January from the final December reading of 99.3. The US Fed said industrial production fell by 0.3% in December after climbing by a downwardly revised 0.8% in November. The US housing starts surged by 16.9% to an annual rate of 1.608 million in December after jumping by 2.6% to a revised rate of 1.375 million in November. This this gain, the housing starts jumped to their highest level since hitting a rate of 1.649 million in December of 2006. China's economy expanded at the slowest pace since 1990 as cooling domestic demand. In the whole year of 2019, gross domestic product grew 6.1 percent, which was well within the target of 6-6.5 percent, data from the National Bureau of Statistics showed Friday. In the fourth quarter, gross domestic product climbed 6.0 percent year-on-year, the same rate as seen in the third quarter and in line with expectations. The 6 percent was the lowest in nearly three decades. Eurozone inflation rose to 1.3% in December, as initially estimated, from 1% in November.

Global Equities: US stocks yet again reached new record closing highs.

Indian Economy: The Reserve Bank of India, on a review of the current liquidity and market situation and an assessment of the evolving financial conditions, has decided to conduct simultaneous purchase and sale of government securities under Open Market Operations (OMO) for ₹ 10,000 crores each on January 23, 2020 (Thursday). The Reserve Bank will purchase 7.32% government bond maturing on 28-Jan-2024 and 6.45% government bond maturing on 07-Oct-2029. The Reserve Bank will also simultaneously sell securities using the multiple price auction method. This includes the 7.80% government bond maturing on 11+Apr-2021 and 7.94% government bond maturing on 24-May-2021.

Equity Markets: Key equity barometers ended near the flat line after a volatile session on Friday. The Nifty ended a tad above the 12,350 level. Main indices were impacted by the Supreme Court verdict on adjusted gross revenue (AGR) dues on the telecom sector. Broader market, however, extended recent uptrend. The barometer BSE S&P Sensex rose 12.81 points or 0.03% to 41,945.37. The Nifty 50 index lost 3.15 points or 0.03% to 12,352.35.

Corporate News: RIL Posts Record Rs 11,640 Crore Profit In Q3 December 2019. On a consolidated basis, RIL reported 13.55% increase in net profit to Rs 11,640 crore on 2.52% decrease in net sales to Rs 152,939 crore in Q3 December 2019 over Q3 December 2018. PBT (profit before tax) rose 3.58% year-on-year (YoY) to Rs 14,962 crore in Q3 December 2019. RIL incurred one-time expense of Rs 177 crore during the quarter. In view of Supreme Court judgment on adjusted gross revenue (AGR), the company recognised estimated liability for the period 2010-11 to 2018-19 towards license fees or spectrum usage charges at Rs 177 crore. HDFC Bank reported a 32.77% rise in net profit to Rs 7416.48 crore in Q3 December 2019 from Rs 5585.9 crore in Q3 December 2018. Profit before tax (PBT) for Q3 December 2019 was at Rs 9,901.90 crore. Adjusting for one-off credit items, the core PBT at Rs 10,401.90 crore, grew by approximately 21%. The bank's net revenues (net interest income plus other income) increased by 19.1% to 20,842.20 crore for the quarter ended 31 December 2019. Net interest income for Q3 December 2019 grew 12.69% to Rs 14,172.90 crore from Rs 12,576.80 crore for Q3 December 2018. The net interest margin for the quarter remained stable at 4.2%.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	1,372.5	139.0	46.8
MF(INR cr)	194.1	188.4	272.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	40,442	35,577	37,214
F&O(INR cr)	1,044,469	1,614,213	1,364,910

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.1	12.9	14.9
NSE VIX	14.1	13.8	16.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,591	(0.8) %	4.2 %	Energy	16,078	0.6 %	(2.7) %
IT	16,357	(0.2) %	3.3 %	Pharma	8,345	1.7 %	(11.0) %
Metals	2,865	(0.7) %	(7.7) %	Finance	14,562	(0.6) %	16.5 %
Auto	8,428	0.4 %	0.2 %	PSU	2,452	(0.6) %	(27.6) %
FMCG	31,371	0.1 %	3.9 %	Real Estate	324	0.1 %	21.3 %

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>
Bharti Air	500	5.5 %	59.8 %	Vodafone I	5	(25.0) %	(74.6) %
Piramal En	1,627	5.2 %	(38.1) %	Bharti Inf	218	(10.2) %	(30.5) %
Bosch	15,387	3.8 %	(15.0) %	IndusInd B	1,352	(2.5) %	(22.4) %
Siemens	1,588	3.4 %	40.4 %	Motherson	140	(2.4) %	(9.0) %
Dr Reddy's	3,034	3.3 %	8.6 %	ICICI Pru	482	(2.2) %	32.8 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Teranet/National Bank HP Index (DEC)	20-01-2020	19:00	CAD	-	227.96
Domestic Sight Deposits CHF (JAN 17)	20-01-2020	14:30	CHF	-	-
1-Year Loan Prime Rate (JAN)	20-01-2020	7:00	CNY	-	0.042
German Producer Price Index (MoM) (DEC)	20-01-2020	12:30	EUR	-	0
Rightmove House Prices (YoY) (JAN)	20-01-2020	5:31	GBP	-	0.008
Industrial Production (YoY) (NOV F)	20-01-2020	10:00	JPY	-	(0.081)
BOJ Outright Bond Purchase 1~3 Years	20-01-2020	6:40	JPY	-	-

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