



20 Jan.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,521	0.0 %	75.9 %
BSE SENSEX	49,398	1.7 %	75.4 %
CNX BANK	32,425	0.0 %	78.1 %
CNX MIDCAP	21,969	0.0 %	91.5 %
CNX SMALLCAP	7,396	0.0 %	108.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,931	0.4 %	1.1 %
S&P 500	3,799	0.8 %	1.1 %
FTSE 100	6,713	(0.1) %	2.1 %
HANG SENG	29,642	2.7 %	7.9 %
NIKKEI	28,633	1.4 %	5.0 %
SHANGHAI COMPOSITE	3,566	(0.8) %	1.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.21	0.2 %	0.4 %
EUR/USD	1.21	(0.6) %	(1.6) %
GBP/USD	1.36	(0.7) %	(0.6) %
USD/JPY	103.74	(0.2) %	0.6 %
USD/AUD	1.30	1.1 %	0.3 %
USD/SGD	1.33	0.4 %	0.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(2.3) %	10.0 %
Gold(INR/10g)	48,977	0.3 %	(4.0) %
Gold Comex(USD/oz)	1,843	0.8 %	(5.4) %
SILVER(INR/1Kg)	65,764	1.4 %	(4.5) %
Aluminium(USD/MT)	1,980	(1.0) %	(1.7) %
Copper(USD/MT)	7,973	(0.1) %	0.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.1	0.0 %	0.2 %

Global Economy: Janet Yellen, US President-elect Joe Biden's nominee to run the Treasury Department has stated that the government must act big with its next coronavirus relief package. Europe's new car registrations were down 3.3% on a yearly basis in December, but slower than the 12% fall logged in November, data published by the European Automobile Manufacturers' Association, or ACEA, showed on Tuesday. Data showed that the four largest EU markets reported very different results. Sales in Italy declined 14.9% and that in France slid 11.8%. Meanwhile, Germany registered a robust growth of 9.9% and Spain's sales remained stable. The euro area current account surplus declined in November due to a sharp fall in secondary income, the European Central Bank reported Tuesday. The current account surplus fell to EUR 25 billion in November from EUR 26 billion in October. The surplus totaled EUR 24 billion in the same period last year. The visible trade surplus remained unchanged at EUR 34 billion and the services trade surplus held steady at EUR 9 billion. Germany's economy is set to grow 3.5% this year after a 5.4% contraction in the coronavirus-hit 2020, the International Monetary Fund said in a report released Tuesday. Investor sentiment in Germany rose in January, the ZEW economic research institute said on Tuesday. The survey of investors' economic sentiment increased to 61.8 from 55.0 points the previous month, ZEW said. Despite the uncertainty about the further course of the lockdown, the economic outlook for the German economy has improved slightly.

Global Equities: US stocks saw supportive moves though globally rising Covid-19 cases made the overall environment choppy.

Indian Economy: India has crossed a crucial milestone in its fight against the global Covid-19 pandemic. The daily new cases have touched a new low. 10,064 daily new cases were added to the national tally in the last 24 hours after seven months, an official update noted on Tuesday. The daily new cases were 10,956 on 12th June, 2020. India's total Active Caseload has dropped to 2 lakh (2,00,528). India's present active caseload now consists of just 1.90% of India's total Positive Cases.

Equity Markets: The domestic indices bounced on Tuesday after falling for the past two consecutive sessions. The Nifty closed above the crucial 14,500 mark. All the sectoral indices on NSE ended in green. Firm global cues and robust FII inflows in domestic equities boosted sentiment. The rally was broad based. The S&P BSE Mid-Cap index soared 2.31% while the S&P BSE Small-Cap index gained 1.65%.

Corporate News: HDFC Bank, ICICI Bank and the State Bank of India continue to be the Domestic Systemically Important Banks. The additional Common Equity Tier 1 (CET1), a crucial requirement for these lenders, has already been phased-in from April 1, 2016 and became fully effective from April 1, 2019, according to the Reserve Bank of India. Bajaj Finance, Bajaj Finserv, HDFC Asset Management Company, Federal Bank, Hindustan Zinc, Havells India will be in focus ahead of latest quarterly earnings. Tata Communications reported consolidated profit at Rs 309.4 crore in Q3FY21 against Rs 384.8 crore in Q2FY21 while its revenue fell to Rs 4,222.8 crore from Rs 4,401.1 crore QoQ.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	266.5	213.6	165.2
MF(INR cr)	(523.7)	(1,053.3)	(537.4)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	65,364	71,195	59,327
F&O(INR cr)	2,694,873	3,149,664	2,156,267

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	24.3	23.9	28.8
NSE VIX	22.9	21.9	26.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,425	1.9 %	78.1 %	Energy	17,519	1.8 %	62.6 %
IT	26,044	0.5 %	116.2 %	Pharma	12,866	1.7 %	83.1 %
Metals	3,405	2.9 %	119.2 %	Finance	15,614	2.4 %	74.6 %
Auto	10,137	1.8 %	117.6 %	PSU	1,941	2.7 %	51.3 %
FMCG	34,660	0.5 %	31.5 %	Real Estate	338	4.2 %	96.5 %

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>
Hindustan	299	11.2 %	86.2 %	Abbott Ind	14,602	(1.0) %	(6.5) %
Bajaj Fins	8,924	6.8 %	98.2 %	ICICI Lomb	1,510	(0.9) %	36.6 %
Tata Motor	259	5.2 %	280.6 %	Tech Mahin	993	(0.6) %	94.2 %
Bajaj Fina	4,959	5.1 %	123.5 %	ITC	219	(0.4) %	31.5 %
Bosch	15,183	4.6 %	64.4 %	Tata Consu	583	(0.4) %	108.1 %

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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