



20 Feb.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,126	1.1 %	3.9 %
BSE SENSEX	41,323	1.0 %	6.3 %
CNX BANK	30,838	0.9 %	1.7 %
CNX MIDCAP	17,990	1.5 %	(1.9) %
CNX SMALLCAP	6,140	1.3 %	(8.9) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,348	0.4 %	2.8 %
S&P 500	3,386	0.5 %	4.8 %
FTSE 100	7,457	1.0 %	(1.9) %
HANG SENG	27,656	0.5 %	(3.1) %
NIKKEI	23,401	0.9 %	0.8 %
SHANGHAI COMPOSITE	2,975	(0.3) %	(3.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.39	(0.1) %	0.3 %
EUR/USD	1.08	(0.1) %	(3.6) %
GBP/USD	1.30	(0.3) %	(1.4) %
USD/JPY	109.80	0.0 %	1.1 %
USD/AUD	1.50	0.4 %	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)	41,491	1.3 %	6.4 %
Gold Comex(USD/oz)	1,601	1.2 %	3.8 %
SILVER(INR/1Kg)	47,650	2.6 %	3.5 %
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: Leaving interest rates at their current levels is likely to remain appropriate for some time, according to the assessments offered by Federal Reserve officials in the minutes of the central bank's latest monetary policy meeting. Eurozone construction output fell in December after rising in the previous month, Eurostat reported on Wednesday. The construction output dropped 3.1% month-on-month in December, after a 0.7% rise in November. The decline was driven by a 3.6% decrease in building construction and a 1.4% fall in civil engineering. On a year-on-year basis, the construction output dropped 3.7% in December, after a 1.4% gain in the prior month. The value of core machine orders in Japan was down 12.5% on month in December, the Cabinet Office said on Wednesday - coming in at 824.8 billion yen. On an annual basis, core machine orders sank 3.5% after rising 5.3% in the previous month. For the third quarter of 2019, core machine orders fell 2.1% on quarter and 1.5% on year. Japan recorded a merchandise trade deficit of 1,312.6 billion yen in January, the Ministry of Finance said on Wednesday. This marked a sharp spurt compared to the 154.6 billion yen deficit in December. Exports fell 2.6% on year following the 6.3% drop in the previous month. Imports also slipped 3.6% on year after tanking 4.9% in previous month. The wage price index in Australia rose by a seasonally adjusted 0.5% on quarter in the fourth quarter of 2019, the Australian Bureau of Statistics said on Wednesday. On a yearly basis, wages advanced 2.2%. Public sector wages rose 0.4% on quarter and 2.2% on year, while private sector wages gained 0.5% on quarter and 2.2% on year.

Global Equities: Stocks edged higher on Wednesday, although the economic impact of the coronavirus outbreak continued to weigh. The Nasdaq and the S&P 500 reached new record closing highs.

Indian Economy: Ministry of Earth Science said in a latest update that India and Norway have decided to strengthen partnership on blue economy. India's Minister for Earth Sciences, Harsh Vardhan, and Norway's Minister for Climate and Environment, Sveinung Rotevatn, opened the India-Norway Task Force on Blue Economy for Sustainable Development. The two countries also commenced a new collaboration on Integrated Ocean Management & Research. As a part of the Joint Initiatives, several projects on combating Marine Litter are already being implemented. The government on Wednesday approved Rs 4,558-crore scheme to promote the dairy sector which will benefit about 95 lakh farmers, according to media reports.

Equity Markets: Benchmark Sensex rebounded, snapping four days of losses. The equity benchmark ended near the day's high after a stellar run on Wednesday. Buying was supported by positive global shares. Sentiment also improved after the finance minister said the government would unveil measures to limit the impact of the coronavirus outbreak. The S&P BSE Sensex surged 428.62 points or 1.05% at 41,323, as per the provisional closing data. The Nifty 50 index was up 137.80 points or 1.15% at 12,130.30, as per the provisional closing data.

Corporate News: Sterlite Technologies said the company has added new orders of Rs 1,500 crore. These orders have ranged from continued business development in its core areas of optical connectivity solutions and network services to emerging areas such as software virtualization. Kotak Mahindra Bank said the Reserve Bank has granted its final approval for reducing promoters' stake in the bank. Asian Paints said the Board of Directors of the company will be held on Tuesday, 25 February, 2020, to consider and approve payment of second interim dividend, if any, for the financial year ending 31 March, 2020. The record date for payment of second interim dividend, if declared, will be Wednesday, 4 March, 2020.



FUND FLOWS

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

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	40,006	38,509	37,243
F&O(INR cr)	1,739,011	1,605,685	1,401,344

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.8	15.0	14.9
NSE VIX	14.0	0	0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,838	0.9 %	1.7 %	Energy	15,057	1.8 %	(8.9) %
IT	16,772	0.1 %	5.9 %	Pharma	8,379	2.2 %	(10.6) %
Metals	2,591	1.4 %	(16.5) %	Finance	14,520	1.4 %	16.2 %
Auto	7,687	(0.1) %	(8.6) %	PSU	2,148	0.9 %	(36.6) %
FMCG	30,835	1.6 %	2.1 %	Real Estate	306	1.1 %	14.6 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Vodafone I	4	40.0 %	(76.3) %	Tata Motor	64	(3.8) %	(30.8) %
Aurobindo	602	20.3 %	(24.0) %	Tata Motor	158	(2.2) %	(15.6) %
Bharti Inf	225	7.2 %	(28.4) %	Bandhan Ba	415	(1.8) %	(21.7) %
NMDC	105	5.7 %	(0.3) %	JSW Steel	281	(1.4) %	(3.9) %
Grasim Ind	757	4.6 %	(11.7) %	Motherson	122	(1.4) %	(20.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Employment Change (JAN)	20-02-2020	6:00	AUD	-	-
Teranet/National Bank HP Index (JAN)	20-02-2020	19:00	CAD	-	228.44
Exports (MoM) (JAN)	20-02-2020	12:30	CHF	-	(0.034)
Industrial Output w.d.a. (YoY) (4Q)	20-02-2020	13:00	CHF	-	0.08
Swift Global Payments CNY (JAN)	20-02-2020	6:30	CNY	-	0.0194
1-Year Loan Prime Rate (FEB)	20-02-2020	7:00	CNY	-	0.0415
ECB Vice President Guindos Speaks in Frankfurt	20-02-2020	16:00	EUR	-	-
Publication of account of ECB's Monetary Policy Meeting (JAN)	20-02-2020	18:00	EUR	-	-
Euro-Zone Consumer Confidence (FEB A)	20-02-2020	20:30	EUR	-	(8.1)
Retail Sales Ex Auto Fuel (YoY) (JAN)	20-02-2020	15:00	GBP	-	0.007
CBI Trends Selling Prices (FEB)	20-02-2020	16:30	GBP	-	2
Machine Tool Orders (YoY) (JAN F)	20-02-2020	11:30	JPY	-	(0.356)
Foreign Buying Japan Bonds (FEB 14)	20-02-2020	5:20	JPY	-	-
Producer Price Index Input (QoQ) (4Q)	20-02-2020	3:15	NZD	-	0.009
Fed's Kaplan Speaks in Dallas	20-02-2020	0:00	USD	-	-
FOMC Meeting Minutes (JAN 29)	20-02-2020	0:30	USD	-	-
EIA Natural Gas Storage Change (FEB 14)	20-02-2020	21:00	USD	-	(115)
DOE U.S. Crude Oil Inventories (FEB 14)	20-02-2020	21:30	USD	-	-
U.S. to Sell 4-Week Bills	20-02-2020	22:00	USD	-	-
U.S. to Sell USD8 Bln 30-Year TIPS	20-02-2020	23:30	USD	-	-
Fed's Barkin Speaks at Harvard	20-02-2020	23:50	USD	-	-
Fed's Barkin Discusses Monetary Policy Framework	20-02-2020	3:00	USD	-	-

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