



20 Dec.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,283	0.2 %	5.3 %
BSE SENSEX	41,674	0.3 %	7.2 %
CNX BANK	32,343	0.3 %	6.6 %
CNX MIDCAP	16,963	0.3 %	(7.5) %
CNX SMALLCAP	5,716	0.4 %	(15.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,377	0.5 %	21.6 %
S&P 500	3,205	0.5 %	27.9 %
FTSE 100	7,574	0.4 %	12.5 %
HANG SENG	27,800	(0.3) %	10.6 %
NIKKEI	23,865	(0.3) %	22.0 %
SHANGHAI COMPOSITE	3,017	0.0 %	22.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.02	0.2 %	2.3 %
EUR/USD	1.11	(0.2) %	(2.8) %
GBP/USD	1.31	(1.0) %	2.5 %
USD/JPY	109.46	(0.1) %	(0.2) %
USD/AUD	1.45	(0.3) %	2.3 %
USD/SGD	1.36	0.0 %	(0.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	0.5 %	31.5 %
Gold(INR/10g)	37,882	(0.2) %	20.1 %
Gold Comex(USD/oz)	1,477	0.2 %	14.4 %
SILVER(INR/1Kg)	43,978	(0.5) %	14.9 %
Aluminium(USD/MT)	1,766	0.4 %	(5.0) %
Copper(USD/MT)	6,161	0.6 %	5.5 %

FIXED INCOME

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

Global Economy: US existing home sales tumbled by 1.7% to an annual rate of 5.35 million in November after jumping by 1.5% to a revised 5.44 million in October, a report released by the National Association of Realtors on Thursday showed. Despite the much bigger than expected monthly decrease, existing home sales in November were still up by 2.7% compared to the same month a year ago. The Bank of England's Monetary Policy Committee (MPC) voted by a majority of 7-2 to maintain Bank Rate at 0.75%. The Committee voted unanimously to maintain the stock of sterling non-financial investment-grade corporate bond purchases, financed by the issuance of central bank reserves, at £10 billion. The Committee also voted unanimously to maintain the stock of UK government bond purchases, financed by the issuance of central bank reserves, at £435 billion. UK GDP increased by 0.3% in 2019 Q3 and is expected to rise only marginally in Q4. Household consumption has continued to grow steadily, but business investment and export orders have remained weak. UK retail sales dropped in November as consumers curbed spending ahead of general election. Retail sales volume, including auto fuel, decreased 0.6% on a monthly basis, after remaining unchanged in October, the Office for National Statistics reported Thursday. This was the biggest fall seen so far this year. Sweden's central bank hiked its key interest rate as expected, as inflation remained near the target. The Executive Board of Riksbank lifted the repo rate to zero percent from -0.25%. Bank of Japan left its massive monetary stimulus unchanged on Thursday and maintained its upbeat view on economy despite the sales tax hike hurting spending. The Policy Board of the BoJ voted 7-2 to retain the interest rate at -0.1% on current accounts that financial institutions maintain at the central bank. Unemployment rate in Australia came in at a seasonally adjusted 5.2% in November, following a reading of 5.3% in October.

Global Equities: US stocks stayed supported. The S&P 500 index on Thursday surged above 3,200 for the first time

Indian Economy: The Federation of Automobile Dealers Associations (FADA) India approached the Supreme Court seeking directions to allow dealers to sell and register Bharat Stage IV, or BS IV-compliant vehicles, even after the more stringent BS-VI norms come into effect on 1 April. The request for exemption has been made for stocks purchased from original equipment manufacturers (OEMs) before 1 March 2020. According to the Food Corporation of India (FCI), Wheat stocks in the central pool at the beginning of December stood at 351.75 lakh tonnes, hitting a seven-year high. Stocks with the FCI are 119.43 lakh tonnes while stocks with the state agencies are 232.32 lakh tonnes. Last year, around the same time, the wheat stocks in central pool stood at 306.29 lakh hectares. This reflects that the current level marks a jump of 15%. Union Minister for Finance & Corporate Affairs, Nirmala Sitharaman held her 6th Pre-Budget Consultation with leading Industrialists today in connection with the forthcoming General Budget 2020-21.

Equity Markets: Key equity benchmarks attained record high levels for the third straight session on Thursday, supported by auto and IT stocks. Trading was volatile on account of weekly expiry of index options on the NSE. The barometer index, the BSE Sensex, rose 115.35 points or 0.28% to 41,673.92, as per the provisional closing data. The Nifty 50 index gained 38.15 points or 0.31% to 12,259.80, as per the provisional closing data.

Corporate News: NMDC said the Ministry of Coal has allocated two coal blocks to NMDC, the Rohne and Tokisud North for commercial mining. Both these blocks are located at Hazaribagh District of Jharkhand. CRISIL said its board of directors has approved acquisition of 100% of the equity share capital of Greenwich Associates LLC and its six subsidiaries, at a consideration of \$ 40 million. Tata Chemicals said the company, through its wholly-owned subsidiary, Valley Holdings, Inc., has acquired the remaining 25% partnership interest from The Andover Group, Inc. in Tata Chemicals (Soda Ash) Partners Holdings.





FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	260.7	36.7	39.9
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)	34,611	36,276	36,868
F&O(INR cr)	2,812,247	1,464,602	1,357,566

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.0	15.9
NSE VIX	12.1	13.5	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	32,241	(0.0) %	6.3 %	Energy	16,113	1.0 %	(2.5) %
IT	15,813	0.7 %	(0.2) %	Pharma	8,073	(0.2) %	(13.9) %
Metals	2,691	0.1 %	(13.3) %	Finance	14,571	(0.3) %	16.6 %
Auto	8,166	1.0 %	(3.0) %	PSU	2,514	0.0 %	(25.7) %
FMCG	30,386	0.3 %	0.6 %	Real Estate	290	(0.1) %	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>
Yes Bank	50	6.7 %	(81.9) %	Indiabulls	294	(2.8) %	(65.3) %
Bandhan Ba	518	3.7 %	(2.2) %	Vedanta	149	(2.3) %	(20.9) %
Eicher Mot	22,427	3.2 %	11.9 %	Interglobe	1,286	(1.8) %	(9.2) %
Vodafone I	7	3.1 %	(62.8) %	Grasim Ind	743	(1.5) %	(13.3) %
TCS	2,229	2.8 %	9.7 %	Sun Pharma	434	(1.4) %	(9.4) %

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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