



21 Jan.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,225	(1.0) %	4.8 %
BSE SENSEX	41,529	(1.0) %	6.8 %
CNX BANK	31,081	(1.6) %	2.5 %
CNX MIDCAP	17,973	(0.6) %	(2.0) %
CNX SMALLCAP	6,244	(0.7) %	(7.3) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,348	0.2 %	2.8 %
S&P 500	3,330	0.4 %	3.1 %
FTSE 100	7,651	(0.3) %	0.6 %
HANG SENG	28,796	(0.9) %	0.9 %
NIKKEI	24,084	0.2 %	3.8 %
SHANGHAI COMPOSITE	3,096	0.7 %	0.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.87	0.1 %	(0.5) %
EUR/USD	1.11	(0.5) %	(1.1) %
GBP/USD	1.30	(0.4) %	(1.4) %
USD/JPY	110.20	0.2 %	1.4 %
USD/AUD	1.46	0.5 %	2.0 %
USD/SGD	1.35	0.1 %	0.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	0.0 %	(4.3) %
Gold(INR/10g)	39,947	0.4 %	2.4 %
Gold Comex(USD/oz)	1,560	0.2 %	1.1 %
SILVER(INR/1Kg)	46,617	0.2 %	1.2 %
Aluminium(USD/MT)	1,807	0.6 %	2.0 %
Copper(USD/MT)	6,245	(0.5) %	1.3 %

**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 Equities:** The International Monetary Fund (IMF) has cut its forecasts for global growth. IMF reduced global growth forecasts for 2020 and 2021, though it expects a pick-up from 2019. The fund warned that climate change-related disasters such as storms, floods, heatwaves and droughts are causing "severe humanitarian costs". In an update to its World Economic Outlook, the IMF said the global economy expanded last year by 2.9%, down 0.1% from its previous forecast in October. It is down from a growth rate of 3.6% in 2018. The IMF estimates that the global economy will expand by 3.3% in 2020 and 3.4% next year. The IMF's chief economist Gita Gopinath said there are tentative signs that global growth may be stabilising. China one-year loan prime rate was retained at 4.15% and the five-year loan prime rate at 4.80%. Germany's producer prices fell 0.2% year-on-year in December, slower than the 0.7% decrease seen in November, data from Destatis showed on Monday. On a monthly basis, producer prices were up 0.1% after remaining unchanged in November. Excluding energy, producer prices gained 0.2% on month, taking the annual growth to 0.4% in December. Japan's industrial production fell by a seasonally adjusted 1% month-on-month November. According to the initial estimate, production had declined 0.9%. On a yearly basis, industrial production dropped 8.2% in November versus the initial estimate of 8.1% decrease.

**Global Equities:** European stocks saw steady moves as focus shifted to the upcoming central bank meetings this week. US market was closed for a public holiday.

**Indian Equities:** After attaining record high levels in early trade, key equity barometers reversed trend and ended near the day's low on Monday. The Nifty settled below the 12,250 level. Selling emerged at record high levels due to concerns over stretched valuations. also turned cautious ahead of the Union Budget on 1 February 2020. The Q3 earnings of index majors failed to impress investors. The barometer BSE S&P Sensex fell 416.46 points or 0.99% to 41,528.91. The Nifty 50 index lost 121.60 points or 0.98% to 12,230.75.

**Equity Markets:** Finance ministry has given its go ahead to a proposal from department of land resources under the ministry of rural development to restore the funding pattern on advance basis for the Digital India Land Records Modernisation Programme of the department as against reimbursement basis done so far to enhance the spending capacity of states. Society of Indian Automobile Manufacturers (SIAM), the apex body representing all major vehicle and vehicular engine manufacturers in the country, is bullish on the revival of the automobile industry in 2020. Since the penetration of automobiles in the country is low, many foreign players will look at this opportunity to enter India, SIAM deputy director Sugato Sen stated, according to media reports. Following a strong surge in the area under Wheat, the total planted area in the current rabi season to 641 lakh hectares (lh) as on 17th January 2020, recording a 8.6% surge compared to the corresponding period last year.

**Corporate News:** Bharti Airtel and Google Cloud announced a partnership to serve the evolving needs of millions of Indian businesses in a rapidly digitizing economy. Bharti Airtel will offer G Suite to small and medium sized businesses (SMBs) in India as part of its integrated Information and communications technology (ICT) portfolio. The agreement will provide a platform for both companies to tap growth opportunities in India. KEI Industries reported 50.39% rise in consolidated net profit to Rs 72.52 crore on 21.07% rise in total income to Rs 1314.09 crore in Q3 December 2019 over Q3 December 2018. Total Institutional sales stood at Rs 743 crore in Q3 December 2019 as compared to Rs 530 crore in last Q3 December 2018. Pending order is approx. Rs 4173 crore plus the company is L1 for Rs 316 crore worth of orders. Media conglomerate, Zee Entertainment, will announce its Q3 result today, 21 January 2020.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(200.0)	114.8	45.5
MF(INR cr)	236.2	192.3	272.0

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	37,925	35,745	37,218
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	15.4	13.9	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	31,081	(1.6) %	2.5 %	Energy	15,855	(1.4) %	(4.1) %
IT	16,207	(0.9) %	2.3 %	Pharma	8,269	(0.9) %	(11.8) %
Metals	2,836	(1.0) %	(8.6) %	Finance	14,360	(1.4) %	14.9 %
Auto	8,353	(0.9) %	(0.7) %	PSU	2,415	(1.5) %	(28.7) %
FMCG	31,427	0.2 %	4.1 %	Real Estate	326	0.5 %	21.9 %

## 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>
NHPC Ltd	27	11.5 %	8.0 %	Power Fin.	112	(7.9) %	(6.3) %
Vodafone I	5	7.8 %	(72.7) %	L&T Fin.Ho	118	(7.2) %	(22.4) %
NMDC	139	7.0 %	31.8 %	Kotak Mah.	1,618	(4.7) %	20.8 %
Power Grid	205	3.7 %	4.7 %	Lupin	733	(4.4) %	(4.4) %
Bharti Air	509	1.7 %	62.6 %	I O C L	118	(4.2) %	(26.0) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
ANZ Roy Morgan Weekly Consumer Confidence Index (JAN 19)	21-01-2020	4:00	AUD	-	107.3
Manufacturing Sales (MoM) (NOV)	21-01-2020	19:00	CAD	-	(0.007)
Money Supply M3 (YoY) (DEC)	21-01-2020	13:30	CHF	-	0.013
ECB President Lagarde Attends Event in Brussels	21-01-2020	0:00	EUR	-	-
Euro-Zone ZEW Survey (Economic Sentiment) (JAN)	21-01-2020	15:30	EUR	-	11.2
Average Weekly Earnings (3M/YoY) (NOV)	21-01-2020	15:00	GBP	-	0.032
BOE Governor Carney Speaks on Panel at Davos	21-01-2020	20:30	GBP	-	-
Performance Services Index (DEC)	21-01-2020	3:00	NZD	-	53.3
Non Resident Bond Holdings (DEC)	21-01-2020	7:30	NZD	-	0.527
U.S. to Sell USD36 Bln 26-Week Bills	21-01-2020	22:00	USD	-	-

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