



22 Jan.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,590	0.0 %	76.8 %
BSE SENSEX	49,625	(0.3) %	74.9 %
CNX BANK	32,187	0.0 %	76.8 %
CNX MIDCAP	21,927	0.0 %	91.2 %
CNX SMALLCAP	7,391	0.0 %	108.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,176	(0.0) %	1.9 %
S&P 500	3,853	0.0 %	2.6 %
FTSE 100	6,715	(0.4) %	2.2 %
HANG SENG	29,928	(0.1) %	8.9 %
NIKKEI	28,757	0.8 %	5.5 %
SHANGHAI COMPOSITE	3,621	1.1 %	3.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.98	(0.3) %	0.0 %
EUR/USD	1.21	0.4 %	(1.2) %
GBP/USD	1.37	0.7 %	0.1 %
USD/JPY	103.71	(0.0) %	0.5 %
USD/AUD	1.29	(0.7) %	(0.3) %
USD/SGD	1.33	(0.4) %	0.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	0.5 %	11.8 %
Gold(INR/10g)	49,442	0.7 %	(3.1) %
Gold Comex(USD/oz)	1,871	(0.1) %	(4.0) %
SILVER(INR/1Kg)	67,085	1.8 %	(2.6) %
Aluminium(USD/MT)	1,993	0.8 %	(1.0) %
Copper(USD/MT)	8,051	0.5 %	1.7 %

FIXED INCOME

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

Global Economy: The US housing starts soared by 5.8% to an annual rate of 1.669 million in December from the revised November estimate of 1.578 million. With the much this increase, housing starts hit their highest level since reaching a rate of 1.720 million in September of 2006. The Philly Fed said its diffusion index for current activity soared to 26.5 in January after slumping to a revised 9.1 in December. The US initial jobless claims fell to 900,000, a decrease of 26,000 from the previous week's revised level of 926,000. Eurozone flash consumer confidence index fell to -15.5 from -13.9 in December. The European Central Bank left its key interest rates and asset purchases unchanged on Thursday and reaffirmed its willingness to adjust the policy tools when needed. Japan posted a merchandise trade surplus of 751.005 billion yen in December, the Ministry of Finance said on Thursday, up from 366.8 billion yen in November. Exports were up 2% on year at 6.706 trillion yen following the 4.2% decline in the previous month. Imports sank an annual 11.6% to 5.955 trillion yen following the 11.1% drop a month earlier. The Bank of Japan decided to leave its monetary policy unchanged on Thursday and raised the growth projections. The board voted 7-1 to retain the interest rate at -0.1% on current accounts that financial institutions maintain at the central bank. The bank will continue to purchase necessary amount of Japanese government bonds without setting an upper limit so that 10-year JGB yields will remain at around zero percent.

Global Equities: US stocks stayed supported on optimism about more fiscal stimulus under Joe Biden. Tech stocks saw good strength.

Indian Economy: The Reserve Bank Of India (RBI), stated in a latest monthly update that in India, recent shifts in the macroeconomic landscape have brightened the outlook, with GDP in striking distance of attaining positive territory and inflation easing closer to the target. Financial markets remain ebullient with EMEs receiving strong portfolio inflows and India on track for receiving record annual inflows of foreign direct investment. If these movements sustain, policy space could open up to further support the recovery. In H1:2021-22, GDP growth will benefit from statistical support and is likely to be mostly consumption-driven.

Equity Markets: Domestic equity indices corrected on Thursday as investors booked profits after gains in past two consecutive sessions. The Nifty ended below the crucial 14,600 mark. The Sensex failed to close above the psychological 50,000 mark after scaling that level in morning trade.

Corporate News: HDFC Bank will be in focus as Sebi imposed Rs 1 crore penalty on HDFC Bank for non-compliance with an interim order. Reliance Industries, HDFC Life Insurance Company, SBI Life Insurance Company will be in focus ahead of latest quarterly earnings. India expects some international oil majors to participate in the Bharat Petroleum divestment process during the price bid stage, Oil Minister Dharmendra Pradhan has said, media reports noted.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	341.1	215.7	165.8
MF(INR cr)	(165.2)	(882.9)	(531.5)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	86,441	72,132	59,515
F&O(INR cr)	6,906,326	3,412,943	2,185,508

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.3	23.5	28.7
NSE VIX	22.2	21.9	26.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,187	(1.1) %	76.8 %	Energy	17,564	(0.2) %	63.1 %
IT	26,450	(0.6) %	119.6 %	Pharma	12,697	(1.4) %	80.7 %
Metals	3,362	(2.2) %	116.4 %	Finance	15,547	(0.7) %	73.9 %
Auto	10,368	(0.0) %	122.6 %	PSU	1,916	(3.3) %	49.3 %
FMCG	34,494	(0.3) %	30.9 %	Real Estate	330	(2.6) %	91.6 %

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>
Havells In	1,132	11.0 %	133.6 %	Bandhan Ba	341	(5.3) %	74.8 %
Tata Motor	291	5.7 %	327.7 %	Indraprast	533	(5.1) %	36.4 %
Adani Tran	472	3.6 %	149.0 %	Hindustan	283	(4.5) %	76.5 %
Adani Gree	1,049	2.8 %	585.9 %	O N G C	95	(4.2) %	44.0 %
Bajaj Fina	5,118	2.7 %	130.6 %	Bank of Ba	76	(4.0) %	48.9 %

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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