



23 Dec.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	13,466	1.0 %	63.2 %
BSE SENSEX	46,007	1.0 %	62.8 %
CNX BANK	29,626	0.6 %	62.7 %
CNX MIDCAP	19,965	0.8 %	74.0 %
CNX SMALLCAP	6,659	0.8 %	88.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,016	(0.7) %	5.2 %
S&P 500	3,687	(0.2) %	14.1 %
FTSE 100	6,453	0.6 %	(15.1) %
HANG SENG	26,119	(0.7) %	(8.5) %
NIKKEI	26,436	(1.0) %	13.9 %
SHANGHAI COMPOSITE	3,357	(1.9) %	8.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.38	(0.0) %	3.1 %
EUR/USD	1.22	0.1 %	9.2 %
GBP/USD	1.35	(0.5) %	2.4 %
USD/JPY	103.36	0.2 %	(4.9) %
USD/AUD	1.31	0.0 %	(7.9) %
USD/SGD	1.33	0.2 %	(1.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.0 %	(21.0) %
Gold(INR/10g)	49,979	(0.3) %	28.2 %
Gold Comex(USD/oz)	1,895	0.2 %	22.8 %
SILVER(INR/1Kg)	66,953	0.1 %	45.4 %
Aluminium(USD/MT)	2,049	1.0 %	15.6 %
Copper(USD/MT)	7,964	0.9 %	29.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	0.9	0.0 %	(1.0) %

Global Economy: The US Conference Board said its consumer confidence index fell to 88.6 in December from a downwardly revised 92.9 in November. US economy rebounded by slightly more than previously estimated in the third quarter of 2020. The report showed the spike in gross domestic product in the third quarter was upwardly revised to 33.4% from the previously reported 33.1%. German forward-looking consumer sentiment index fell to -7.3 in January from -6.8 in December, due to the severe lockdown measures introduced to withstand the second wave of Covid-19 infections, survey results from the market research group GfK showed Tuesday. The score was forecast to drop to -8.8. UK gross domestic product grew by a record 16% sequentially in the third quarter instead of 15.5% expansion estimated previously, the Office for National Statistics said Tuesday. GDP had fallen by revised 18.8 percent in the second quarter. Although this reflects some recovery of activity following the record contraction in the second quarter, GDP was 8.6% below where it was at the end of 2019. The annual fall in GDP was revised to 8.6% from 9.6% in the third quarter. Data showed that the cumulative fall in GDP in the first half of 2020 was 21.2% compared with the previous estimate of a 21.8% cumulative fall. Australia total value of retail sales spiked a seasonally adjusted 7% on month in November, the Australian Bureau of Statistics said on Tuesday, coming in at A\$31.623 billion, following the 1.4% increase in October. By industry, Household goods led the rises (13%), impacted by a full month of trade in Victorian stores, a successful Black Friday sales period, and new product releases in the Electrical and electronic goods subgroup.

Global Equities: The US stocks stayed under pressure on tepid consumer confidence and worries over the new Covid-19 variant.

Indian Economy: The continuous improvement in the key economic and business indicators signals that the worst is behind us and expectations of positive GDP growth at 0.1% to 2% in Q3 and 2% to 4% in Q4 FY 2020-21 are becoming strong with a higher growth trajectory in FY 2021-22 at 7.7%, according to PHDCCI EBM Index (Economic and Business Momentum Index). A total of 3.75 crore taxpayers have already filed their Income Tax returns for Assessment Year 2020-21 (fiscal year 2019-20) till December 21, the Income Tax department said on Tuesday. India has registered several landmark achievements in the fight against the global pandemic today. India's active caseload has fallen below 3 lakh. The share of Active Cases in the total Positive Cases has further shrunk below 3% to 2.90%. This is lowest after 163 days.

Equity Markets: Benchmark indices ended a volatile session with strong gains on Tuesday. The Nifty closed above 13,400 mark after slipping below that level in intraday. IT and pharma shares led the broader recovery. The broader market ended with gains. The S&P BSE Mid-Cap index rose 1.09% while the S&P BSE Small-Cap index added 0.95%. The market breadth was positive. On the BSE, 1574 shares rose and 1,348 shares fell. A total of 170 shares were unchanged. In Nifty 50 index, 43 stocks advanced while 7 stocks declined.

Corporate News: Wipro will be in focus as its share buyback offer will open on December 29 and close on January 11. The company signed a strategic digital and IT deal with METRO AG. Bharat Biotech and US-based biopharmaceutical firm Ocugen Inc on Tuesday said they have signed a binding letter of intent to co-develop the Indian firm's COVID-19 vaccine candidate Covaxin for the US market. Bajaj Auto signed an MoU with the Maharashtra government to set up a manufacturing unit in Chakan and will invest Rs 650 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	3.1	394.7	160.8
MF(INR cr)	(1,156.3)	(1,490.2)	(493.3)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	76,208	69,824	58,525
F&O(INR cr)	3,471,532	2,835,104	2,036,063

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.6	21.9	29.2
NSE VIX	22.0	19.4	26.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,626	0.6 %	62.7 %	Energy	16,569	1.2 %	53.8 %
IT	23,612	3.4 %	96.0 %	Pharma	12,551	2.2 %	78.6 %
Metals	3,080	1.4 %	98.2 %	Finance	14,422	0.2 %	61.3 %
Auto	8,819	0.8 %	89.3 %	PSU	1,659	1.0 %	29.3 %
FMCG	33,329	0.5 %	26.4 %	Real Estate	289	0.5 %	68.0 %

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>
Indraprast	493	6.1 %	26.2 %	Abbott Ind	15,510	(2.1) %	(0.7) %
Bandhan Ba	397	6.0 %	103.5 %	Avenue Sup	2,626	(2.1) %	26.1 %
Adani Port	469	5.5 %	91.4 %	Punjab Nat	33	(2.1) %	9.7 %
L & T Info	3,573	5.2 %	156.6 %	Bajaj Hold	3,016	(1.8) %	71.9 %
HCL Techno	914	5.0 %	121.0 %	Kotak Mah.	1,903	(0.9) %	61.0 %

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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