



24 Feb.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,081	(0.4) %	3.5 %
BSE SENSEX	41,170	(0.4) %	5.9 %
CNX BANK	30,943	0.3 %	2.0 %
CNX MIDCAP	18,110	0.7 %	(1.2) %
CNX SMALLCAP	6,162	0.4 %	(8.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,992	(0.8) %	1.6 %
S&P 500	3,338	(1.1) %	3.3 %
FTSE 100	7,404	(0.4) %	(2.6) %
HANG SENG	27,309	(1.1) %	(4.3) %
NIKKEI	23,387	(0.4) %	0.8 %
SHANGHAI COMPOSITE	3,040	0.3 %	(1.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.68	0.3 %	0.7 %
EUR/USD	1.08	(0.0) %	(3.7) %
GBP/USD	1.29	(0.6) %	(2.2) %
USD/JPY	111.79	1.1 %	2.9 %
USD/AUD	1.51	0.8 %	5.8 %
USD/SGD	1.40	0.5 %	4.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	0.2 %	(12.7) %
Gold(INR/10g)	41,493	0.0 %	6.4 %
Gold Comex(USD/oz)	1,642	2.0 %	6.4 %
SILVER(INR/1Kg)	47,587	(0.1) %	3.3 %
Aluminium(USD/MT)	1,677	(0.5) %	(5.4) %
Copper(USD/MT)	5,702	(0.8) %	(7.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.5	(0.1) %	(0.5) %

Global Economy: National Association of Realtors or NAR said that US existing home sales fell by 1.3% to an annual rate of 5.46 million in January after surging up by 3.9 percent to a revised rate of 5.53 million in December. Despite the monthly decrease, the report noted existing home sales in January were up by 9.6% compared to the same month a year ago. Euro area private sector grew for a third straight month and at the fastest pace in six months in February. The flash composite purchasing managers' index, or PMI, climbed to 51.6 from 51.3 in January, preliminary survey data from IHS Markit showed on Friday. UK manufacturing grew at the fastest pace in 10 months in February, while the services sector expanded at the slowest pace in two months. The flash IHS Markit / CIPS Flash UK Composite Purchasing Managers' Index showed a reading of 53.3 in February, unchanged from January.

Global Equities: US stocks tumbled on Friday amid continued Coronavirus worries. The tech-heavy Nasdaq led the declines with 1.8% loss while the Dow slipped 0.8% and the S&P 500 tanked 1.1%.

Indian Economy: Reserve Bank Of India (RBI) governor Shaktikanta Das noted in last monetary policy meeting that considering the overall evolving growth-inflation situation, it would be prudent to continue the focus on growth in the context of the expected moderation in inflation. This would indeed be in sync with the concept of flexible inflation targeting. Financial stability also requires revival of the growth trajectory, he stated. The governor further said that the Union Budget has sought to provide counter-cyclical support to the economy while broadly adhering to fiscal prudence.

Equity Markets: Key equity benchmarks ended with modest losses on Thursday. After trading near the flat line for most part of the session, key indices slipped in the last hour of the trade and ended near the day's low. The Nifty, however, managed to close slightly above the 12,000 mark. Trading was volatile due to expiry of weekly index options on the NSE. The S&P BSE Sensex, fell 152.88 points or 0.37% to 41,170.12. The Nifty 50 index lost 45.05 points or 0.37% at 12,080.85.

Corporate News: Automobile dealers' body Federation of Automobile Dealers Associations (FADA), said passenger vehicle (PV) retail sales in January fell 4.61% to 2,90,879 units as compared to same month last year, hit by tepid response by end customers. Total sales across categories also declined 7.17% to 17,50,116 units last month. Auto sales continue to be in the negative territory in the month of January, except for 3W, with many consumers still not concluding on their decisions. Ongoing Transition of BS-IV to BS-VI is also a factor in delayed purchase decision, FADA noted. Biocon received three observations from the US health regulator following inspection of its insulin manufacturing facility in Malaysia. The USFDA had conducted a pre-approval inspection of Biocon's subsidiary Biocon Sdn Bhd's manufacturing facility in Malaysia for Insulin Glargine between February 10 and 21. Bharti Infratel said its board will meet on February 24 to chart out the future course of action following the telecom department's approval for merger with Indus Towers. Wipro Digital, the digital business unit of IT major Wipro has acquired digital customer experience (CX) firm Rational Interaction. However, Wipro Digital didn't disclose the acquisition amount.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	181.1	176.8	50.0
MF(INR cr)	192.1	48.3	241.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	46,599	39,049	37,286
F&O(INR cr)	3,314,285	1,719,592	1,410,000

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.1	15.1	14.9
NSE VIX	13.7	0	0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,943	0.3 %	2.0 %	Energy	14,988	(0.5) %	(9.3) %
IT	16,649	(0.7) %	5.1 %	Pharma	8,364	(0.2) %	(10.8) %
Metals	2,612	0.8 %	(15.8) %	Finance	14,510	(0.1) %	16.1 %
Auto	7,698	0.1 %	(8.5) %	PSU	2,169	1.0 %	(35.9) %
FMCG	30,636	(0.6) %	1.5 %	Real Estate	306	0.0 %	14.6 %

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>
Indiabulls	338	10.7 %	(60.1) %	DLF	220	(3.0) %	12.6 %
Vodafone I	4	4.8 %	(75.2) %	General In	210	(2.8) %	(14.5) %
Shriram Tr	1,341	3.9 %	8.5 %	Cipla	436	(2.6) %	(17.1) %
Ashok Leyl	84	3.8 %	(6.7) %	Asian Pain	1,842	(2.3) %	23.4 %
IndusInd B	1,182	3.5 %	(32.2) %	Bajaj Hold	3,680	(2.2) %	9.8 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Wholesale Trade Sales (MoM) (DEC)	24-02-2020	19:00	CAD	-	(0.012)
Domestic Sight Deposits CHF (FEB 21)	24-02-2020	14:30	CHF	-	-
ECB's Lagarde Speaks at ECB and Its Watchers Conference	24-02-2020	13:50	EUR	-	-
Bi-Weekly CPI (FEB 15)	24-02-2020	17:30	MXN	-	0.0011
Retail Sales Ex Inflation (QoQ) (4Q)	24-02-2020	3:15	NZD	-	0.016
Credit Card Spending (YoY) (JAN)	24-02-2020	7:30	NZD	-	0.034
Dallas Fed Manufacturing Activity (FEB)	24-02-2020	21:00	USD	-	(0.2)
U.S. to Sell 13-Week Bills	24-02-2020	22:00	USD	-	-

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