



24 Dec.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,274	0.1 %	5.2 %
BSE SENSEX	41,643	(0.1) %	7.2 %
CNX BANK	32,354	0.0 %	6.7 %
CNX MIDCAP	16,927	0.3 %	(7.7) %
CNX SMALLCAP	5,694	0.3 %	(15.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,552	0.3 %	22.4 %
S&P 500	3,224	0.1 %	28.6 %
FTSE 100	7,624	0.5 %	13.2 %
HANG SENG	27,906	0.1 %	11.0 %
NIKKEI	23,821	0.0 %	21.8 %
SHANGHAI COMPOSITE	2,963	(1.4) %	20.2 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.95	(0.1) %	2.2 %
EUR/USD	1.11	(0.5) %	(3.3) %
GBP/USD	1.30	(0.5) %	2.0 %
USD/JPY	109.50	0.0 %	(0.1) %
USD/AUD	1.45	(0.3) %	2.0 %
USD/SGD	1.36	0.0 %	(0.7) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	61	(1.1) %	30.0 %
Gold(INR/10g)	38,128	0.5 %	20.9 %
Gold Comex(USD/oz)	1,483	0.3 %	14.9 %
SILVER(INR/1Kg)	45,018	1.8 %	17.7 %
Aluminium(USD/MT)	1,772	0.1 %	(4.7) %
Copper(USD/MT)	6,153	(0.0) %	5.4 %

**FIXED INCOME**

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

**Global Economy:** The US Commerce Department said new home sales jumped by 1.3% to an annual rate of 719,000 after plunging by 2.7% to a revised rate of 710,000 in October. The US durable goods orders plummeted by 2% in November after rising by a downwardly revised 0.2% in October. Japan's all industry activity dropped for the first time in four months in October, figures from the Ministry of Economy, Trade and Industry showed on Monday. The all industry activity index fell 4.3% month-on-month in October, after a 1.9% rise in September. Private sector credit in Australia was up a seasonally adjusted 0.1% on month in November, the Reserve Bank of Australia said on Monday. That was unchanged from the October reading. On a yearly basis, credit rose 2.3%. Singapore's consumer price inflation accelerated in November, data from the Monetary Authority of Singapore and the Ministry of Trade and Industry showed on Monday. The consumer price index rose 0.6% year-on-year in November, following a 0.4% increase in October.

**Global Equities:** China stated that it will lower import tariffs on over 850 products from January 1st 2020, including frozen pork, as well as some information technology products starting July 1st, 2020.

**Indian Economy:** Sushil Kumar Modi, Deputy Chief Minister of Bihar, and designated Convenor of Group of Ministers on IGST, said that there is no possibility of any change in Goods and Services Tax (GST) rates till the revenue stabilises. Speaking at FICCI's 92nd Annual Convention on the theme 'India: Roadmap to a \$5 Trillion Economy', Modi allayed the fears of any hike in GST tax rate saying the media reports have been wrong in predicting an increase in the rates. About 35 Lakh Passengers flown under RCS-Udan scheme till date, according to a latest press release from the Ministry of Civil Aviation. A total of 134 routes commenced from 1.1.2019 to 10.12.2019 while 10 Airports were operationalized in 2019 (till 07.12.2019) out of which 4 airports are underserved and 6 airports are unserved. In 2018, only Hubli airport was operationalized. According to a latest update from the Indian Meteorological Department (IMD), for the country as a whole, cumulative rainfall during this year's post monsoon season upto 18 December, 2019 is 35% above Long Period Average (LPA). For Northwest India, the rainfall is higher by 121% while for Central India, it is up by 65%. For South Peninsula, the rainfall is up by 19% while for East & northeast India; it is down by 6%.

**Equity Markets:** Key benchmark indices snapped four-day rising streak on Monday. The trading sentiment took a hit as the ruling BJP appeared to be set for second place in a tight contest for Jharkhand Assembly election. The Nifty 50 index slipped below 12,250 level. The barometer index, the BSE Sensex, fell 38.88 points or 0.09% to 41,642.66, as per the provisional closing data. The Nifty 50 index lost 5.65 points or 0.05% to 12,266.15, as per the provisional closing data.

**Corporate News:** NIIT Technologies said the board of directors has approved buy-back of up to 19,56,290 fully paid equity shares at a price of up to Rs 1,725 per share aggregating up to Rs 337 crore. The number of securities proposed to be bought back represents 3.1 % of the existing paid up equity share capital of the Company. Tata Motors said it has received NCLT order sanctioning the Scheme of Arrangement between the Company and Tata Advanced Systems Limited for transfer of the Defense Undertaking. Hindalco said its Muri refinery in Jharkhand restarted production of Alumina after receiving consent to operate from Jharkhand State Pollution Control. On 10 April, 2019 the company had informed that operations of Alumina plant were suspended due to the spillage in the red mud cake storage area. Going forward, the company may not need to import Alumina.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	117.7	42.5	40.3
MF(INR cr)	52.9	242.3	297.0

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	32,043	36,483	36,880
F&O(INR cr)	1,007,983	1,390,287	1,352,089

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.0	15.9
NSE VIX	12.0	13.4	16.7

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,339	(0.1) %	6.6 %	Energy	15,972	(0.7) %	(3.4) %
IT	15,866	0.1 %	0.2 %	Pharma	8,052	0.0 %	(14.1) %
Metals	2,706	(0.0) %	(12.8) %	Finance	14,649	0.2 %	17.2 %
Auto	8,181	0.6 %	(2.8) %	PSU	2,536	(1.3) %	(25.1) %
FMCG	30,218	(0.5) %	0.1 %	Real Estate	291	(0.4) %	8.8 %

### 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>
Zee Entert	295	3.8 %	(31.7) %	Yes Bank	50	(3.4) %	(82.0) %
Berger Pai	520	2.6 %	57.6 %	Bandhan Ba	504	(2.5) %	(5.0) %
Bosch	15,399	2.5 %	(14.9) %	Vodafone I	6	(2.3) %	(63.9) %
Vedanta	148	2.4 %	(21.8) %	Nestle Ind	14,533	(2.2) %	33.1 %
Bajaj Hold	3,354	2.0 %	0.0 %	NHPC Ltd	24	(1.9) %	(5.0) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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