



24 Dec.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	13,601	0.0 %	64.8 %
BSE SENSEX	46,444	1.0 %	64.3 %
CNX BANK	29,883	0.0 %	64.1 %
CNX MIDCAP	20,440	0.0 %	78.2 %
CNX SMALLCAP	6,840	0.0 %	93.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,130	0.4 %	5.6 %
S&P 500	3,690	0.1 %	14.2 %
FTSE 100	6,496	0.7 %	(14.6) %
HANG SENG	26,343	0.9 %	(7.7) %
NIKKEI	26,525	0.3 %	14.3 %
SHANGHAI COMPOSITE	3,382	0.8 %	9.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.83	0.6 %	3.7 %
EUR/USD	1.22	(0.4) %	8.8 %
GBP/USD	1.34	(0.9) %	1.6 %
USD/JPY	103.50	0.1 %	(4.7) %
USD/AUD	1.33	0.9 %	(7.1) %
USD/SGD	1.34	0.5 %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.0 %	(21.0) %
Gold(INR/10g)	49,706	(0.5) %	27.5 %
Gold Comex(USD/oz)	1,895	0.2 %	22.8 %
SILVER(INR/1Kg)	65,518	(2.1) %	42.3 %
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 Commerce Department said new home sales fell by 11% to an annual rate of 841,000 in November after sliding by 2.1% to a revised rate of 945,000 in October. A report released by the University of Michigan on Wednesday showed US consumer sentiment improved by less than initially estimated in the month of December. The consumer sentiment index for December was downwardly revised to 80.7 from the previously reported 81.4. The US initial jobless claims slid to 803,000, a decrease of 89,000 from the previous week's revised level of 892,000. German import prices decreased 3.8% on a yearly basis in November, following a 3.9% drop in October, data from Destatis revealed on Wednesday. UK car production declined in November, data released by the Society of Motor Manufacturers and Traders, or SMMT, showed Wednesday. Car manufacturing decreased 1.4% annually to 106,243 units in November. The annual decline in production masks a particularly weak November 2019 when precautionary factory shutdowns in anticipation of a potential 'no deal' Brexit on October 31, depressed output. Year-to-date production was down -31% with 380,809 fewer cars manufactured in 2020. Japan's leading index, which measures the future economic activity, rose to 94.3 in October from 93.3 in September, final data from the Cabinet Office showed. In the initial estimate, the reading was 93.8. The coincident index increased to 89.4 in October from 84.8 in the previous month. According to the initial estimate, the reading was 89.7. The lagging index rose to 91.2 in October versus 89.9 in the initial estimate. In September, the reading was 91.7.

Global Equities: US stocks remained well supported. European markets edged up on Brexit talk hopes.

Indian Economy: Shaktikanta Das, Governor, Reserve Bank of India (RBI) held meetings with the MD/CEOs of Public Sector Banks and select Private Sector Banks on December 22 and 23, 2020 respectively through video conference. The Governor touched upon the current economic situation and emphasized the importance of the banking sector in supporting the ongoing revival in economic activities. With specific reference to the financial sector, he highlighted the measures taken by the RBI since the onset of the pandemic to stabilise the economy and to ensure financial stability. With regard to the banking sector, he reiterated the need for banks to remain vigilant and take proactive measures to strengthen their resilience and lending capacity by raising capital and making provisions proactively. The ongoing trend of contraction of India's total active cases continues. The active caseload of the country stands at 2,89,240 now. The share of Active Cases in the total Positive Cases has further shrunk to 2.86%. Following the national trend, 26 States/UTs have less than 10,000 active cases. The daily recoveries exceeding the daily new cases have ensured a total net reduction of the Active Caseload.

Equity Markets: Key domestic indices ended with strong gains on Wednesday, supported by buying in IT and pharma stocks. The Nifty closed above the crucial 13,600 mark. All the sectoral indices on the NSE ended in the green.

Corporate News: Adani Green Energy emerged as the largest winner in the 1200MW wind-solar hybrid auction conducted by the Solar Energy Corporation of India on Wednesday. Mrs Bectors Food Specialities is set to debut on bourses on December 24, final issue price has been fixed at Rs 288 per share. Dish TV, Den Networks, GTPL Hathway, Hathway Cable etc in focus as Cabinet approved the change in norms to allow 100% FDI in DTH services, saying DTH licence will be issued for 20 years and licence fee will be collected quarterly.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	436.1	397.2	162.4
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)	61,252	69,288	58,540
F&O(INR cr)	2,884,493	2,838,009	2,040,699

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.6	21.9	29.2
NSE VIX	20.5	19.5	26.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,883	0.9 %	64.1 %	Energy	16,628	0.4 %	54.4 %
IT	24,168	2.4 %	100.6 %	Pharma	12,753	1.6 %	81.5 %
Metals	3,134	1.8 %	101.7 %	Finance	14,517	0.7 %	62.3 %
Auto	8,936	1.3 %	91.9 %	PSU	1,693	2.1 %	32.0 %
FMCG	33,966	1.9 %	28.9 %	Real Estate	301	3.9 %	74.6 %

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>
Piramal En	1,424	6.7 %	52.1 %	Punjab Nat	32	(4.8) %	4.4 %
Wipro	386	5.9 %	103.5 %	Divi's Lab	3,689	(0.9) %	96.5 %
Tata Consu	605	5.1 %	116.2 %	Indraprast	489	(0.8) %	25.1 %
Interglobe	1,649	5.0 %	65.1 %	Titan Comp	1,491	(0.5) %	59.3 %
Adani Tran	428	4.8 %	126.0 %	NTPC	99	(0.4) %	21.7 %

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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