



25 Jan.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	14,372	(1.5) %	74.1 %
BSE SENSEX	48,879	(1.5) %	72.9 %
CNX BANK	31,167	(3.2) %	71.2 %
CNX MIDCAP	21,659	(1.2) %	88.8 %
CNX SMALLCAP	7,348	(0.6) %	107.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,997	(0.6) %	1.3 %
S&P 500	3,841	(0.3) %	2.3 %
FTSE 100	6,695	(0.3) %	1.9 %
HANG SENG	29,448	(1.6) %	7.2 %
NIKKEI	28,631	(0.4) %	5.0 %
SHANGHAI COMPOSITE	3,607	(0.4) %	3.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.92	(0.1) %	(0.1) %
EUR/USD	1.21	0.2 %	(1.0) %
GBP/USD	1.37	0.4 %	0.4 %
USD/JPY	103.51	(0.2) %	0.3 %
USD/AUD	1.29	(0.4) %	(0.7) %
USD/SGD	1.32	(0.2) %	0.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(1.8) %	9.8 %
Gold(INR/10g)	48,920	(1.1) %	(4.1) %
Gold Comex(USD/oz)	1,871	0.0 %	(4.0) %
SILVER(INR/1Kg)	65,477	(2.4) %	(4.9) %
Aluminium(USD/MT)	1,976	(0.9) %	(1.9) %
Copper(USD/MT)	7,872	(2.2) %	(0.6) %

FIXED INCOME

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

Global Economy: The Existing home sales in the US rebounded in the month of December, according to a report released by the National Association of Realtors (NAR) on Friday. NAR said existing home sales climbed by 0.7% to an annual rate of 6.76 million in December after tumbling by 2.2% to a revised rate of 6.71 million in November. Eurozone private sector activity contracted at an accelerated pace in January amid the ongoing pandemic and related restrictions, flash data from IHS Markit showed Friday. The composite output index dropped to 47.5 in January from 49.1 in December. The score signaled third successive contraction and the largest fall since November. The rate of factory output growth weakened to the slowest since the recovery began and the service sector saw output fall at the second-fastest rate since May. The factory Purchasing Managers Index or PMI fell to 54.7 from 55.2 in the previous month. The services PMI eased to 45 from 46.4 in December. UK public sector net borrowing, excluding public sector banks, totalled GBP 34.1 billion in December, which was GBP 28.2 billion more than in the same period last year, data from the Office for National Statistics showed Friday. This was both the highest December borrowing and the third-highest borrowing in any month since monthly records began in 1993. UK retail sales volume gained 0.3% month-on-month In December, reversing a 4.1% decline seen in November, data released by the Office for National Statistics showed Friday. Sales increased by 2.7% from the February's pre-lockdown level. Clothing stores reported strong monthly growth of 21.5%, rebounding from a large fall in November, when stores were closed because of coronavirus restrictions. Japan consumer prices were down 1.2% on year in December, the Ministry of Internal Affairs and Communications said on Friday, following the 0.9% decline in November. Core consumer prices were down 1.0% on year after also slipping 0.9% in the previous month.

Global Equities: US stocks saw some corrective selling but sentiments were supported on hopes that Democrats could attempt to pass a new stimulus bill without Republican support by the so-called reconciliation process.

Indian Economy: In view of the recent stress in the Non-Banking Financial Companies (NBFC) sector, it has become imperative to reexamine the suitability of this regulatory approach, especially when failure of an extremely large NBFC can precipitate systemic risks, the RBI said. RBI stated in a research paper that regulatory framework of NBFCs shall be based on a four-layered structure- Base Layer (NBFC-BL), Middle Layer (NBFC-ML), Upper Layer (NBFC-UL) and Top Layer.

Equity Markets: The benchmark indices slumped on Friday, dragged by heavy selling in banks and financial stocks. The Nifty gave up the crucial 14,400 mark. Negative global cues triggered profit booking in domestic shares.

Corporate News: Reliance Industries reported a consolidated profit of Rs 14,894 crore in Q3FY21 against Rs 10,602 crore in Q2FY21 while revenue increased to Rs 1,23,997 crore from Rs 1,16,195 crore QoQ. UltraTech Cement reported a consolidated profit of Rs 1,584 crore in Q3FY21 against Rs 711 crore and revenue rose to Rs 12,254.1 crore from Rs 10,439.3 crore YoY. Larsen & Toubro, Kotak Mahindra Bank, Aarti Drugs, APL Apollo Tubes, Astec Lifesciences will be in focus ahead of latest quarterly earnings today. The country's largest private sector lender HDFC Bank has submitted a detailed plan of action to the RBI to address repeated service disruption issues due to outage and hopes to improve its technology platform in three months, media reports noted.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	238.3	217.2	166.2
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)	88,757	73,171	59,660
F&O(INR cr)	3,126,119	3,395,017	2,190,119

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.9	23.4	28.7
NSE VIX	22.4	22.0	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	31,167	(3.2) %	71.2 %	Energy	17,260	(1.7) %	60.2 %
IT	26,490	0.1 %	119.9 %	Pharma	12,542	(1.2) %	78.5 %
Metals	3,231	(3.9) %	108.0 %	Finance	15,142	(2.6) %	69.3 %
Auto	10,516	1.4 %	125.8 %	PSU	1,858	(3.1) %	44.8 %
FMCG	34,430	(0.2) %	30.6 %	Real Estate	320	(2.8) %	86.2 %

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>
Bajaj Auto	4,090	10.4 %	99.4 %	Biocon	394	(10.9) %	41.4 %
SBI Cards	1,033	5.4 %	69.8 %	Bandhan Ba	314	(7.8) %	61.2 %
Avenue Sup	2,863	5.3 %	37.5 %	Piramal En	1,487	(4.9) %	58.8 %
Hero Motoc	3,375	3.9 %	105.8 %	DLF	269	(4.7) %	103.2 %
Info Edg.(5,342	2.6 %	165.2 %	Axis Bank	645	(4.6) %	79.7 %

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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