



25 Feb.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,829	0.0 %	1.4 %
BSE SENSEX	40,363	(2.0) %	3.8 %
CNX BANK	30,455	0.0 %	0.4 %
CNX MIDCAP	17,764	0.0 %	(3.1) %
CNX SMALLCAP	6,041	0.0 %	(10.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,961	(3.6) %	(2.0) %
S&P 500	3,226	(3.4) %	(0.2) %
FTSE 100	7,157	(3.3) %	(5.9) %
HANG SENG	26,821	(1.8) %	(6.0) %
NIKKEI	23,387	(0.4) %	0.8 %
SHANGHAI COMPOSITE	3,031	(0.3) %	(1.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.76	0.4 %	0.8 %
EUR/USD	1.08	0.4 %	(3.3) %
GBP/USD	1.30	(0.1) %	(1.8) %
USD/JPY	111.59	0.9 %	2.7 %
USD/AUD	1.51	0.9 %	5.9 %
USD/SGD	1.40	0.4 %	3.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	(0.2) %	(12.9) %
Gold(INR/10g)	43,392	4.6 %	11.3 %
Gold Comex(USD/oz)	1,642	0.0 %	6.5 %
SILVER(INR/1Kg)	48,919	2.8 %	6.2 %
Aluminium(USD/MT)	1,673	(0.3) %	(5.6) %
Copper(USD/MT)	5,658	(0.8) %	(8.2) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.4	(0.1) %	(0.5) %

Global Economy: Germany's business climate index rose to 96.1 in February from a revised 96.0 in January, survey data from the ifo institute showed Monday. Business confidence improved marginally in February despite fears about the coronavirus outbreak. Although companies assessed their current situation as a little worse, they are less pessimistic about the next six months, the ifo survey showed.

Global Equities: Stocks moved sharply lower during trading on Monday, extending the notable pullback seen over the two previous sessions. The Dow crashed 3.6% to close at its lowest level in two months.

Indian Economy: US President Donald Trump and his wife Melania are in India on a 36-hour trip that will see them visiting Ahmedabad, Agra and New Delhi. It is Trump's first presidential visit to India and the fifth official visit by a serving US president to the country since 2000. Trump said that both the countries were working on a major trade deal. However, US officials clarified on Friday that Trump's visit will not result in even a limited trade deal as they have concerns over India's trade barriers. National Council of Applied Economic Research (NCAER) pegged the economic growth for the current fiscal at 4.9%, a tad down from 5% estimated by the National Statistical Office (NSO). However, for 2020-21, the NCAER expects the Indian economy to improve its growth rate to 5.6%. Indian economy grew by 6.1% in 2018-19.

Equity Markets: Domestic shares slumped on Monday as the spread of the coronavirus outside China spoiled investor sentiment with infections and deaths rising in South Korea, Italy and the Middle East. The Nifty ended below its 100 days simple moving average placed at 11,955.66. The S&P BSE Sensex, lost 806.89 points or 1.96% at 40,363.23. The Nifty 50 index fell 242.25 points or 2.01% at 11,838.60. Selling was wide spread. The S&P BSE Mid-Cap index shed 1.60% while the S&P BSE Small-Cap index fell 1.58%.

Corporate News: In relation to the proposed initial public offering of one of its subsidiaries, SBI Cards, State Bank of India (SBI) said that the IPO committee of SBI Cards has finalised the price band to range between Rs 750 to Rs 755 per equity share. HDFC Bank said managing director Aditya Puri sold 12,52,037 equity shares of the bank from 11-12 February 2020. Puri intends to sell some more shares held by him through previous stock options to exercise stock options already vested in his name. Hindustan Unilever (HUL) said the board of directors approved a proposal to form a new 100% subsidiary with an authorised share capital of Rs 2000 crore. This new subsidiary will leverage the growth opportunities in a fast-changing business environment and will help HUL in becoming more agile and customer-focused.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	117.5	172.2	50.3
MF(INR cr)	707.0	104.5	243.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	41,168	39,181	37,303
F&O(INR cr)	3,314,285	1,719,592	1,410,000

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	25.0	15.8	15.0
NSE VIX	17.0	0	0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,455	(1.6) %	0.4 %	Energy	14,627	(2.4) %	(11.5) %
IT	16,462	(1.1) %	3.9 %	Pharma	8,116	(3.0) %	(13.4) %
Metals	2,470	(5.5) %	(20.4) %	Finance	14,236	(1.9) %	13.9 %
Auto	7,429	(3.5) %	(11.7) %	PSU	2,109	(2.8) %	(37.7) %
FMCG	30,148	(1.6) %	(0.2) %	Real Estate	300	(2.1) %	12.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Ambuja Cem	210	2.2 %	(10.5) %	Aurobindo	504	(16.0) %	(36.4) %
Ashok Leyl	85	0.8 %	(6.0) %	Vodafone I	4	(12.5) %	(78.3) %
Havells In	627	0.6 %	(19.2) %	JSW Steel	259	(8.1) %	(11.4) %
NHPC Ltd	22	0.5 %	(14.0) %	Motherson	115	(6.8) %	(25.4) %
Bajaj Hold	3,695	0.4 %	10.2 %	Vedanta	133	(6.4) %	(29.5) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
ANZ Roy Morgan Weekly Consumer Confidence Index (FEB 23)	25-02-2020	4:00	AUD	-	109.1
Bank of Canada's Lane Gives Speech in Montreal	25-02-2020	23:00	CAD	-	-
German Gross Domestic Product n.s.a. (YoY) (4Q F)	25-02-2020	12:30	EUR	-	0.003
BOE Chief Economist Haldane Speaks in London	25-02-2020	0:00	GBP	-	-
CBI Reported Sales (FEB)	25-02-2020	16:30	GBP	-	0
Coincident Index (DEC F)	25-02-2020	10:30	JPY	-	94.7
Corporate Service Price (YoY) (JAN)	25-02-2020	5:20	JPY	-	0.021
BOJ Outright Bond Purchase 10~25 Year	25-02-2020	6:40	JPY	-	-
Economic Activity IGAE (YoY) (DEC)	25-02-2020	17:30	MXN	-	(0.0121)
Fed's Mester Speaks on Economy at NABE Conference	25-02-2020	1:30	USD	-	-
House Price Index (MoM) (DEC)	25-02-2020	19:30	USD	-	0.002
Consumer Confidence Index (FEB)	25-02-2020	20:30	USD	-	131.6
U.S. to Sell USD26 Bln 52-Week Bills	25-02-2020	22:00	USD	-	-
U.S. to Sell USD40 Bln 2-Year Notes	25-02-2020	23:30	USD	-	-

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