



26 Feb.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,798	(0.3) %	1.1 %
BSE SENSEX	40,281	(0.2) %	3.6 %
CNX BANK	30,433	(0.1) %	0.4 %
CNX MIDCAP	17,700	(0.4) %	(3.5) %
CNX SMALLCAP	6,026	(0.2) %	(10.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,081	(3.2) %	(5.1) %
S&P 500	3,128	(3.0) %	(3.2) %
FTSE 100	7,018	(1.9) %	(7.7) %
HANG SENG	26,893	0.3 %	(5.8) %
NIKKEI	22,605	(3.3) %	(2.6) %
SHANGHAI COMPOSITE	3,013	(0.6) %	(2.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.94	0.4 %	1.0 %
EUR/USD	1.08	0.4 %	(3.4) %
GBP/USD	1.29	0.3 %	(2.0) %
USD/JPY	111.14	(0.6) %	2.3 %
USD/AUD	1.51	0.4 %	6.2 %
USD/SGD	1.40	0.1 %	4.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	51	(3.7) %	(15.9) %
Gold(INR/10g)	42,306	(2.5) %	8.5 %
Gold Comex(USD/oz)	1,642	0.0 %	6.5 %
SILVER(INR/1Kg)	47,796	(2.3) %	3.8 %
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: The Conference Board said its consumer confidence index inched up to 130.7 in February from a downwardly revised 130.4 in January. Germany gross domestic product remained flat sequentially after expanding 0.2% in the previous quarter, data from Destatis revealed on Tuesday. The German economy stagnated in the fourth quarter as the positive contribution to growth from investment was nullified by foreign trade. Consequently, price-adjusted GDP grew 0.6% in 2019. On a non-adjusted basis, GDP rose 0.3% year-on-year after a 1.1% expansion in the third quarter. UK retailers plan to raise their investment in the year ahead for the first time in two years, the latest quarterly Distributive Trends Survey from the Confederation of British Industry showed Tuesday. The balance for investment intentions rose to +26% from -38% in November, which was the biggest swing since the survey began in 1983. At the same time, the business optimism balance was unchanged at 4%. Japan's leading index rose in December as initially estimated, final data from the Cabinet Office showed on Tuesday. The leading index, which measures the future economic activity, rose to 91.6 in December from 90.8 in November. This was in line with initial estimate.

Global Equities: Dow tumbled to its lowest closing level in nearly four months, dropping 3.2% on continued selling pressure.

Indian Economy: Market regulator SEBI on Tuesday said foreign investors from Mauritius will continue to be eligible for FPI registration with increased monitoring as per Financial Action Task Force or FATF norms. SEBI (Foreign Portfolio Investors) Regulations, 2019 inter-alia states that an applicant is eligible to become a FPI if it is not resident in the country identified in the public statement of FATF as- i) a jurisdiction having a strategic Anti-Money Laundering or Combating the Financing of Terrorism deficiencies to which counter measures apply; or ii) a jurisdiction that has not made sufficient progress in addressing the deficiencies or has not committed to an action plan developed with the FATF to address the deficiencies. Union Minister for Steel and Petroleum & Natural Gas Dharmendra Pradhan focussed on collaborations of India and Japan to increase steel usage while speaking in a workshop. Highlighting the Prime Minister Narendra Modi's vision of 5 trillion dollar economy, he said that various policy reforms and Government's initiatives like Pradhan Mantri Awas Yojana, Har Ghar Jal Yojana, unprecedented speed of construction in railways and roads, creation of a gas based economy, creation of new agri-storage facilities and many others are set to drive steel demand growth.

Equity Market: Domestic shares ended with small losses on Tuesday, extending a steep sell-off a day earlier. Despite a positive start, the market barometers reversed trend by mid-afternoon trade and ended in the red. US President Donald Trump's two-day visit in India failed to boost investor sentiment. The barometer index, the S&P BSE Sensex, slipped 82.03 points or 0.20% at 40,281.20. The Nifty 50 index fell 16.20 points or 0.14% at 11,813.20.

Corporate News: Reliance Jio Infocomm recorded a sharp fall in mobile phone user additions in December 2019. Jio added 82,308 mobile users, taking its subscriber base past 370 million in December, way below the 9.1 million and 5.6 million customer-adds reported by the company in October and November respectively last year. Bandhan Bank said the Reserve Bank of India (RBI) has allowed Bandhan Bank to expand its branch network after considering the efforts made by the private lender to comply with the licensing conditions. Wockhardt said India Ratings has revised the company's ratings for short-term Bank facilities to IND A4+/RWE from IND A4+ and long-term loan facilities rating to IND BB+/ RWE from IND BB+/ Negative. CARE Ratings also revised long-term bank facilities (Fund Based) as CARE BB+; (Under credit watch with positive implications); from CARE BB+; Stable.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(241.6)	142.7	49.0
MF(INR cr)	164.0	54.4	238.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	38,751	39,156	37,310
F&O(INR cr)	1,415,568	1,675,625	1,409,425

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.0	15.8	15.0
NSE VIX	16.9	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	30,433	(0.1) %	0.4 %	Energy	14,456	(1.2) %	(12.6) %
IT	16,563	0.6 %	4.6 %	Pharma	7,938	(2.2) %	(15.3) %
Metals	2,470	0.0 %	(20.4) %	Finance	14,236	(0.0) %	13.9 %
Auto	7,366	(0.8) %	(12.5) %	PSU	2,110	0.0 %	(37.7) %
FMCG	30,173	0.1 %	(0.1) %	Real Estate	303	0.9 %	13.2 %

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>
Havells In	644	2.7 %	(17.0) %	Ashok Leyl	81	(5.1) %	(10.7) %
Vodafone I	4	2.6 %	(77.7) %	Piramal En	1,493	(4.8) %	(43.2) %
NHPC Ltd	22	2.3 %	(12.0) %	Interglobe	1,377	(4.7) %	(2.8) %
DLF	217	2.0 %	10.8 %	Biocon	304	(3.3) %	(1.9) %
TCS	2,156	1.9 %	6.1 %	New India	125	(3.1) %	(33.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Construction Work Done (4Q)	26-02-2020	6:00	AUD	-	(0.004)
Credit Suisse Survey Expectations (FEB)	26-02-2020	14:30	CHF	-	8.3
ECB Governing Council member Makhoulouf speaks in Berlin	26-02-2020	16:30	EUR	-	-
ECB President Lagarde Speaks in Wiesbaden, Germany	26-02-2020	19:00	EUR	-	-
BRC Shop Price Index (YoY) (FEB)	26-02-2020	5:31	GBP	-	(0.003)
Supermarket Sales (YoY) (JAN)	26-02-2020	10:30	JPY	-	(0.033)
Fed's Clarida Speaks at NABE Conference in Washington	26-02-2020	1:45	USD	-	-
MBA Mortgage Applications (FEB 21)	26-02-2020	17:30	USD	-	(0.064)
New Home Sales (MoM) (JAN)	26-02-2020	20:30	USD	-	(0.004)
DOE U.S. Crude Oil Inventories (FEB 21)	26-02-2020	21:00	USD	-	-
U.S. to Sell USD18 Bln 2-Year FRNs Reopening	26-02-2020	22:00	USD	-	-
U.S. to Sell USD41 Bln 5-Year Notes	26-02-2020	23:30	USD	-	-

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