



27 Jan.2020

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| CNX NIFTY | 12,248 | 0.6 % | 5.0 % |
| BSE SENSEX | 41,613 | 0.5 % | 7.1 % |
| CNX BANK | 31,242 | 0.8 % | 3.0 % |
| CNX MIDCAP | 18,357 | 0.9 % | 0.1 % |
| CNX SMALLCAP | 6,345 | 0.8 % | (5.8) % |
| GLOBAL INDICES | LATEST | % 1D | % YTD |
| DOW JONES | 28,990 | (0.6) % | 1.6 % |
| S&P 500 | 3,295 | (0.9) % | 2.0 % |
| FTSE 100 | 7,586 | 1.0 % | (0.2) % |
| HANG SENG | 27,950 | 0.2 % | (2.1) % |
| NIKKEI | 23,827 | 0.1 % | 2.7 % |
| SHANGHAI COMPOSITE | 2,977 | (2.8) % | (3.5) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 71.15 | 0.2 % | (0.1) % |
| EUR/USD | 1.11 | (0.1) % | (1.3) % |
| GBP/USD | 1.31 | 0.2 % | (0.5) % |
| USD/JPY | 109.54 | (0.4) % | 0.8 % |
| USD/AUD | 1.46 | (0.2) % | 2.3 % |
| USD/SGD | 1.35 | 0.1 % | 0.3 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 54 | (2.5) % | (11.4) % |
| Gold(INR/10g) | 40,002 | 0.3 % | 2.6 % |
| Gold Comex(USD/oz) | 1,571 | 0.6 % | 1.8 % |
| SILVER(INR/1Kg) | 46,116 | 0.7 % | 0.1 % |
| Aluminium(USD/MT) | 1,776 | (0.3) % | 0.2 % |
| Copper(USD/MT) | 5,968 | (1.4) % | (3.2) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec India | 8.1 | 0.1 % | (0.0) % |
| 10 Y GSec US 10 | 1.7 | (0.0) % | (0.2) % |

Global Economy: The euro area private sector grew at the same moderate pace as seen in the final month of 2019, reflecting muted pace of new order growth, flash survey data from IHS Markit showed Friday. The composite output index held steady at 50.9 in January, indicating a further muted increase in activity across the currency bloc. Germany's private sector gained momentum in January as services activity grew at the fastest pace in five months amid a slower decline in manufacturing, flash survey results from IHS Markit showed. The flash composite output index rose more-than-expected to 51.1 in January from 50.2 in December. This was the highest score in five months. The UK private sector returned to growth in January as the receding political uncertainty lifted new orders, survey results from IHS Markit and the Chartered Institute of Procurement & Supply showed Friday. The flash composite output index rose to a 16-month high of 52.4 in January from 49.3 in December. Japan's private sector rebounded at the start of 2020, driven by the expansion in services output, flash survey results from IHS Markit showed Friday. The Jibun Bank flash composite output index rose to 51.1 in January from 48.6 in December. Australia's private sector output declined at the sharpest pace since the survey began in May 2016, flash survey data from IHS Markit showed. The Commonwealth Bank of Australia composite output index fell to 48.6 in January from 49.6 in December.

Global Equities: The Dow dropped 0.60% while the Nasdaq and the S&P 500 slumped 0.9% each. Markets remained worried about the impact of the coronavirus outbreak.

Indian Economy: Leading industry body Indian Auto LPG Coalition has sought GST reduction on Auto LPG as well as on conversion kits for gaseous fuels to promote the adoption of clean automotive fuels. Around 14.33 lakh jobs were created in November 2019 as compared with 12.60 lakh in the previous month, according to payroll data of the Employees' State Insurance Corporation (ESIC). Gross enrolments of new subscribers with ESIC were 1.49 crore during the entire financial year 2018-19, the National Statistical Office (NSO) said in a report.

Equity Markets: Domestic shares advanced for second straight session on Friday, on broad-based buying support. Firmness in private banks boosted key indices higher. The barometer BSE S&P Sensex rose 226.79 points or 0.55% to 41,613.19. The Nifty 50 index added 67.90 points or 0.56% to 12,248.25.

Corporate News: ICICI Bank Ltd. reported a mixed set of quarterly earnings as the boost from lower provisions and the resolution of its non-performing asset Essar Steel Ltd. was offset by higher tax expense. The lender's net profit rose 158% year-on-year to Rs 4,146.46 crore in the quarter ended December 2019. The bank's net interest income, or the core income from operations, rose 24.3% on a yearly basis to Rs 8,545.32 crore. The net interest margin rose to 3.77% from 3.64% in the previous quarter. Dr Reddy's Labs, CCL Products, HCL Infosystems, InterGlobe Aviation, Mahindra Life, Navin Fluorine, Shanti Gears, Torrent Pharma, V2 Retail and Wockhardt will announce Q3FY20 earnings today. Strides Pharma said the US health regulator has completed inspection of its Alathur facility in Tamil Nadu with zero observations. Maruti Suzuki India Limited today announced the launch of Ciaz S, sports variant of country's best-selling premium mid-size sedan Ciaz.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 210.1 | 124.6 | 47.8 |
| MF(INR cr) | (423.5) | 37.9 | 258.0 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 37,794 | 36,583 | 37,264 |
| F&O(INR cr) | 966,740 | 1,679,932 | 1,380,718 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 14.6 | 12.9 | 14.9 |
| NSE VIX | 15.6 | 14.4 | 16.4 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 31,242 | 0.8 % | 3.0 % | Energy | 15,675 | (0.2) % | (5.2) % |
| IT | 16,473 | (0.0) % | 4.0 % | Pharma | 8,294 | (0.1) % | (11.5) % |
| Metals | 2,796 | 1.0 % | (9.9) % | Finance | 14,420 | 0.9 % | 15.4 % |
| Auto | 8,275 | 0.4 % | (1.7) % | PSU | 2,446 | 0.3 % | (27.7) % |
| FMCG | 31,475 | 0.8 % | 4.2 % | Real Estate | 329 | 0.3 % | 23.0 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Yes Bank | 43 | 4.5 % | (84.5) % | NMDC | 129 | (3.1) % | 22.3 % |
| General In | 266 | 4.2 % | 8.0 % | Power Grid | 197 | (2.5) % | 0.7 % |
| Indiabulls | 323 | 3.4 % | (61.9) % | HDFC Life | 607 | (1.4) % | 58.2 % |
| Motherson | 145 | 3.1 % | (5.6) % | Cipla | 459 | (1.4) % | (12.7) % |
| Power Fin. | 116 | 2.9 % | (3.0) % | IndusInd B | 1,316 | (1.2) % | (24.5) % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|---|-------------|------------------|---------------|---------------|-----------------------|
| Domestic Sight Deposits CHF (JAN 24) | 27-01-2020 | 14:30 | CHF | - | - |
| BBA Loans for House Purchase (DEC) | 27-01-2020 | 15:00 | GBP | - | 43715 |
| New Home Sales (MoM) (DEC) | 27-01-2020 | 20:30 | USD | - | 0.013 |
| Dallas Fed Manufacturing Activity (JAN) | 27-01-2020 | 21:00 | USD | - | (3.2) |
| U.S. to Sell 13-Week Bills | 27-01-2020 | 22:00 | USD | - | - |
| U.S. to Sell 2-Year Notes | 27-01-2020 | 23:30 | USD | - | - |

..... End of Report