



27 Dec.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,160	0.3 %	4.2 %
BSE SENSEX	41,164	(0.7) %	6.2 %
CNX BANK	32,166	0.5 %	6.1 %
CNX MIDCAP	16,918	0.3 %	(7.7) %
CNX SMALLCAP	5,709	0.4 %	(15.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,621	0.4 %	22.7 %
S&P 500	3,240	0.5 %	29.2 %
FTSE 100	7,632	0.1 %	13.3 %
HANG SENG	27,864	(0.2) %	10.9 %
NIKKEI	23,925	0.6 %	22.3 %
SHANGHAI COMPOSITE	3,007	0.9 %	22.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.10	0.2 %	2.4 %
EUR/USD	1.11	0.1 %	(3.2) %
GBP/USD	1.29	(0.4) %	1.6 %
USD/JPY	109.43	(0.1) %	(0.2) %
USD/AUD	1.45	(0.3) %	1.7 %
USD/SGD	1.36	0.0 %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	0.9 %	32.5 %
Gold(INR/10g)	38,641	0.9 %	22.5 %
Gold Comex(USD/oz)	1,498	1.1 %	16.1 %
SILVER(INR/1Kg)	46,458	1.9 %	21.4 %
Aluminium(USD/MT)	1,791	1.1 %	(3.6) %
Copper(USD/MT)	6,185	0.5 %	5.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.9	(0.0) %	(0.7) %

Global Economy: The US Labor Department said initial jobless claims fell to 222,000, a decrease of 13,000 from the previous week's revised level of 235,000. China's industrial profits expanded 5.4% year-on-year in November, in contrast to a 9.9 percent decrease in October, data from the National Bureau of Statistics showed Friday. Data showed that in January to November period, industrial profits decreased 2.1% from the same period last year. Japan's housing starts logged a double-digit decline in November, data from the Ministry of Land, Infrastructure, Transport and Tourism showed on Thursday. Housing starts decreased 12.7% on a yearly basis, following a 7.4% drop in October. This was the fifth consecutive decrease. Japan's services producer prices increased at a steady pace in November, data from Bank of Japan showed on Wednesday. Services producer prices increased 2.1% year-on-year in November, the same rate of increase as seen in October. On a monthly basis, inflation eased to 0.2% from 1.9% in October. Nonetheless, prices have increased for the second straight month after staying flat in September. Singapore industrial production declined notably in November on weak electronics and pharmaceutical output, data from the Economic Development Board showed Thursday. Industrial production decreased 9.3% year-on-year in November, reversing a 3.6% drop in October.

Global Equities: US stocks surged higher again Thursday, supported by reports of record year-end retail sales. The Nasdaq Composite posted a record close for a 10th straight day, the longest winning streak since 1997.

Indian Economy: Residential housing sales in second half (H2) 2019 fell 22% against first-half (H1) 2019 while on yearly basis there was a marginal rise of 5% in entire 2019 compared to 2018. On the supply front, of the total 2.37 lakh units launched in 2019, H2 saw new addition of over 97,000 units as against 1.4 lakh units in the first-half, recording a half-yearly decline of 30%. However, on yearly basis, there was a 21% rise in new supply in 2019 over 2018. India's Crude oil production during November, 2019 was 2614.29 TMT which is 8.69% lower than target and 5.98% lower when compared with November, 2018. Cumulative crude oil production during April-November, 2019 was 21724.76 TMT which is 5.39% and 5.85% lower than target for the period and production during corresponding period of last year respectively.

Equity Markets: Local stock market declined for second consecutive session on Tuesday, as investors locked in some of the recent gains in thin trading ahead of the Christmas holiday on Wednesday. Significant selling in the last hour of trade pushed the Nifty below 12,250 level. An improving outlook on the global economy and optimism surrounding US-China trade deal had sent domestic equities to an all-time high last week. The barometer index, the BSE Sensex, fell 181.40 points or 0.44% to 41,461.26. The Nifty 50 index lost 50.75 points or 0.41% to 12,212.

Corporate News: IT counters could be in focus as Indian Rupee continued to fall. INR closed at 71.31 per US dollar, down 4 paise on the day. The INR has been on a losing spree after breaking above 71 per US dollar and tested a two week low mark yesterday. Gujarat Gas (GGL) said CRISIL has upgraded long term rating on company's bank loan facilities of Rs 2,350 crore to AA+/Stable from AA/Positive. The upgrade reflects CRISIL's expectations of an improvement in GGL's credit profile over the medium term. Sustainable improvement in cash accruals is expected to improve GGL's financial risk profile notwithstanding the sizeable capital expenditure programme. Allahabad Bank said that the Government of India has released fresh capital infusion Rs 2,153 crore towards contribution of the Central Government in the preferential allotment of equity shares (Special Securities/Bonds) of the bank during the financial year 2019-20, as Government's investment.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(1.6)	57.3	41.8
MF(INR cr)	(1,539.7)	131.0	286.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	30,400	35,593	36,786
F&O(INR cr)	1,080,888	1,372,087	1,350,574

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.7	13.7	15.0
NSE VIX	11.1	13.1	16.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,998	(0.9) %	5.5 %	Energy	15,705	(1.0) %	(5.0) %
IT	15,706	(0.5) %	(0.8) %	Pharma	7,998	(0.9) %	(14.7) %
Metals	2,739	0.6 %	(11.7) %	Finance	14,524	(0.5) %	16.2 %
Auto	8,130	(0.3) %	(3.4) %	PSU	2,496	(1.5) %	(26.3) %
FMCG	30,064	(0.4) %	(0.4) %	Real Estate	291	(0.2) %	9.1 %

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>
Vedanta	151	1.8 %	(20.2) %	Yes Bank	49	(5.0) %	(82.4) %
Marico	339	1.7 %	(2.5) %	Indiabulls	297	(4.2) %	(64.9) %
HDFC Life	636	1.6 %	65.6 %	Vodafone I	6	(4.0) %	(65.9) %
Page Indus	22,285	1.6 %	(12.7) %	New India	138	(2.5) %	(26.8) %
O N G C	128	1.6 %	(18.6) %	Bharti Air	448	(2.1) %	43.0 %

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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