



28 Jan.2020

**INDEX PERFORMANCE**

| INDIAN INDICES | LATEST | % 1D    | % YTD   |
|----------------|--------|---------|---------|
| CNX NIFTY      | 12,119 | 0.0 %   | 3.9 %   |
| BSE SENSEX     | 41,155 | (1.1) % | 5.9 %   |
| CNX BANK       | 30,837 | 0.0 %   | 1.7 %   |
| CNX MIDCAP     | 18,291 | 0.0 %   | (0.2) % |
| CNX SMALLCAP   | 6,347  | 0.0 %   | (5.8) % |

| GLOBAL INDICES     | LATEST | % 1D    | % YTD   |
|--------------------|--------|---------|---------|
| DOW JONES          | 28,536 | (1.6) % | (0.0) % |
| S&P 500            | 3,244  | (1.6) % | 0.4 %   |
| FTSE 100           | 7,412  | (2.3) % | (2.5) % |
| HANG SENG          | 27,950 | 0.2 %   | (2.1) % |
| NIKKEI             | 23,344 | (2.0) % | 0.6 %   |
| 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) | 53     | (1.9) % | (13.1) % |
| Gold(INR/10g)      | 40,638 | 1.6 %   | 4.2 %    |
| Gold Comex(USD/oz) | 1,581  | 0.6 %   | 2.5 %    |
| SILVER(INR/1Kg)    | 47,320 | 2.6 %   | 2.7 %    |
| Aluminium(USD/MT)  | 1,756  | (1.1) % | (0.9) %  |
| Copper(USD/MT)     | 5,779  | (3.2) % | (6.3) %  |

**FIXED INCOME**

| INTERBANK RATES | LATEST | BPS 1D  | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec India | 8.1    | 0.1 %   | (0.0) % |
| 10 Y GSec US 10 | 1.6    | (0.1) % | (0.3) % |

**Global Economy:** The US Commerce Department said new home sales fell by 0.4% to an annual rate of 694,000 in December from a downwardly revised 697,000 in November. Revised data also showed new home sales slumped by 1.1 % in November compared to the previously reported 1.3% gain. The median sales price of new houses sold in December was \$331,400, up 3.3% from \$320,900 in November and up 0.5% from \$329,700 in the same month a year ago. China's finance ministry and National Health Commission have extended 60.33 billion yuan to help contain the spread of Coronavirus. The EY Item Club upgraded its UK economic growth forecast to 1.2% for 2020 from the 1 per cent previously predicted, though it marks a slowdown on the estimated 1.3% seen in 2019, according to media reports. Gross mortgage lending across the residential market in 2019 totalled Pound 265.8 billion, a drop of 1.1% from the year before, according to UK Finance, media reports noted. The International Grains Council (IGC) noted in its latest Grain Market Report (GMR) that because of adjustments for maize, the outlook for world total grains (wheat and coarse grains) production in 2019/20 is increased by 8 million tonnes month-on-month, to 2,170 million tonnes in January 2020.

**Global Equities:** The US stocks retreated further from their recent record highs and Dow tumbled 1.5% amid mounting concerns over the impact of a new coronavirus that has killed at least 80 people in China.

**Indian Economy:** Monetary policy frameworks in India have evolved in line with the developments in theory and country practices, the changing nature of the economy and developments in financial markets, noted Shaktikanta Das, Governor, Reserve Bank of India in a speech titled Seven Ages of India's Monetary Policy. Within the broad objectives, however, the relative emphasis on inflation, growth and financial stability has varied across monetary policy regimes. The divestment of Air India restarted on Monday (27 January) with the government seeking to sell 100% of its equity share capital in the state-owned airline, including Air India's shareholding interest of 100% in AI Express and 50% in Air India SATS Airport Services. India's Gold imports dropped 6.77% to \$23 billion during the April-December period of the current financial year, according to data from the commerce ministry.

**Equity Markets:** Key domestic benchmarks snapped two-day winning streak amid negative global cues. Global stock markets were under pressure as investors appeared to be wary about the fast-spreading coronavirus, which started in the China's Wuhan city. Investors also turned cautious ahead of the Union Budget on Saturday, 1 February 2020. The barometer BSE S&P Sensex slumped 473.41 points or 1.14% to 41,139.78, as per the provisional closing data. The Nifty 50 index fell 136.45 points or 1.11% to 12,111.80, as per the provisional closing data.

**Corporate News:** Housing Development Finance Corporation (HDFC) reported 296.09% rise in net profit to Rs 8,372.49 crore on 91.75% spurt in total income to Rs 20,291.45 crore in Q3 December 2019 over Q3 December 2018. GRUH Finance (GRUH), an associate of HDFC, merged into and with Bandhan Bank with effect from 17 October 2019. InterGlobe Aviation's consolidated net profit surged 167.86% to Rs 495.97 crore on a 25.45% jump in net sales to Rs 9,931.68 crore in Q3 December 2019 over Q3 December 2018. ASK (available seat kilometers) jumped 19.3% to Rs 2,580 crore in Q3 December 2019 as compared to Rs 2,160 crore in Q3 December 2018.



### FUND FLOWS

|             | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 83.6          | 122.5      | 47.9       |
| 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) | 35,781        | 36,540         | 37,256         |
| F&O(INR cr)  | 1,168,352     | 1,653,006      | 1,379,666      |

### MARKET VOLATILITY

|          | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 18.2          | 13.2           | 14.9           |
| NSE VIX  | 17.2          | 14.5           | 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  | 30,837        | (1.3) %     | 1.7 %        | Energy      | 15,489        | (1.2) %     | (6.3) %      |
| IT     | 16,394        | (0.5) %     | 3.5 %        | Pharma      | 8,416         | 1.5 %       | (10.2) %     |
| Metals | 2,710         | (3.1) %     | (12.7) %     | Finance     | 14,235        | (1.3) %     | 13.9 %       |
| Auto   | 8,258         | (0.2) %     | (1.9) %      | PSU         | 2,391         | (2.3) %     | (29.4) %     |
| FMCG   | 31,150        | (1.0) %     | 3.2 %        | Real Estate | 327           | (0.6) %     | 22.3 %       |

### 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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Dr Reddy's         | 3,189         | 5.2 %       | 14.1 %       | Vedanta           | 149           | (4.5) %     | (21.2) %     |
| Shree Ceme         | 23,598        | 2.0 %       | 25.5 %       | Tata Steel        | 462           | (4.3) %     | (13.6) %     |
| Aurobindo          | 511           | 2.0 %       | (35.5) %     | Tata Motor        | 76            | (4.2) %     | (18.2) %     |
| M & M              | 578           | 1.9 %       | (12.5) %     | Siemens           | 1,557         | (4.2) %     | 37.6 %       |
| Lupin              | 752           | 1.6 %       | (1.9) %      | Vodafone I        | 6             | (4.1) %     | (67.3) %     |

### EVENTS CALENDAR

| <i>EVENT</i>         | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| <b>No Data Found</b> |             |                  |               |               |                       |

..... End of Report .....