



28 Jan.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	13,968	(1.9) %	69.2 %
BSE SENSEX	47,410	(1.9) %	67.7 %
CNX BANK	30,285	(2.9) %	66.3 %
CNX MIDCAP	21,115	(1.6) %	84.1 %
CNX SMALLCAP	7,273	0.2 %	105.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,303	(2.1) %	(1.0) %
S&P 500	3,751	(2.6) %	(0.1) %
FTSE 100	6,567	(1.3) %	(0.1) %
HANG SENG	29,298	(0.3) %	6.6 %
NIKKEI	28,635	0.3 %	5.1 %
SHANGHAI COMPOSITE	3,573	0.1 %	2.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.90	(0.0) %	(0.1) %
EUR/USD	1.22	0.2 %	(0.8) %
GBP/USD	1.37	(0.2) %	0.2 %
USD/JPY	103.78	0.3 %	0.6 %
USD/AUD	1.30	0.7 %	(0.0) %
USD/SGD	1.33	0.4 %	0.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	0.7 %	10.5 %
Gold(INR/10g)	48,814	(0.9) %	(4.3) %
Gold Comex(USD/oz)	1,851	(1.1) %	(5.1) %
SILVER(INR/1Kg)	65,702	(1.4) %	(4.6) %
Aluminium(USD/MT)	2,025	2.5 %	0.6 %
Copper(USD/MT)	7,957	1.1 %	0.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.0	(0.1) %	0.1 %

Global Economy: The US Federal Reserve said that it is committed to using its full range of tools to support the US economy in this challenging time, thereby promoting its maximum employment and price stability goals. The COVID-19 pandemic is causing tremendous human and economic hardship across the United States and around the world. The pace of the recovery in economic activity and employment has moderated in recent months, with weakness concentrated in the sectors most adversely affected by the pandemic. Weaker demand and earlier declines in oil prices have been holding down consumer price inflation. Overall financial conditions remain accommodative, in part reflecting policy measures to support the economy and the flow of credit to U.S. households and businesses. The path of the economy will depend significantly on the course of the virus, including progress on vaccinations. The ongoing public health crisis continues to weigh on economic activity, employment, and inflation, and poses considerable risks to the economic outlook. The Commerce Department said durable goods orders edged up by 0.2% in December after surging by an upwardly revised 1.2% in November. China's industrial profits jumped last month, data released by the National Bureau of Statistics showed on Wednesday. Industrial profits grew 20.1% year-on-year in December, higher than the 15.5% increase registered in November. This was the eighth consecutive month of increase. In the whole year of 2020, profits of industrial firms increased 4.1%, in contrast to a 3.3% fall in 2019 as manufacturing sector rebound stayed in place. German consumer confidence is set to deteriorate in February under the strict lockdown restrictions, survey results from the market research group GfK showed on Wednesday. The forward-looking consumer sentiment index dropped 8.1 points to -15.6 in February from -7.5 in January. German consumer propensity to buy fell sharply. The economic expectations index eased by 3.1 points to 1.3 in January.

Global Equities: Investor sentiment was dented after the new coronavirus variant resulted in fresh lockdowns and other restrictions on movement in certain counties across the globe.

Indian Economy: The latest round of FICCI's Economic Outlook Survey puts forth an annual median GDP growth forecast for 2020-21 at (-) 8.0%. The median growth forecast for agriculture and allied activities has been put at 3.5% for 2020-21. Agriculture sector has exhibited significant resilience in the face of the pandemic. Higher rabi acreage, good monsoons, higher reservoir levels and strong growth in tractor sales indicate continued buoyancy in the sector. However, industry and services sector, which were most severely hit due to the pandemic induced economic fallout, are expected to contract by (-) 10.0% and (-) 9.2% respectively during 2020-21. The industrial recovery is gaining traction, but the growth is still not broad based. The quarterly median forecasts indicate GDP growth to contract by (-) 1.3% in the third quarter of 2020-21.

Equity Markets: Domestic shares tumbled sharply on Wednesday on across the board selling pressure. Barring the Nifty FMCG index, all the sectoral indices on the NSE declined. Banks and financial shares tumbled. Domestic shares were also under pressure ahead of monthly derivatives expiry on Thursday.

Corporate News: Hindustan Unilever posted a 19% year-on-year growth in profit at Rs 1,921 crore for the quarter ended December 2020 backed by strong revenue growth and operating income. Consolidated revenue from operations grew by 21 percent to Rs 11,872 crore in Q3FY21 with domestic volume growth of 4%.m Marico Ltd reported a 13% increase in consolidated net profit to Rs 312 crore for the quarter ended December 2020. Revenue from operations of the company went up by 16.33% to Rs 2,122 crore. IT stocks could be under pressure as the Indian Rupee consolidated around four month high against the US dollar.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	40.7	187.3	164.2
MF(INR cr)	(875.3)	(925.0)	(541.8)

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	75,006	73,585	59,829
F&O(INR cr)	4,621,298	3,466,457	2,208,059

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.0	23.4	28.6
NSE VIX	24.4	22.2	26.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,285	(2.9) %	66.3 %	Energy	16,483	(1.7) %	53.0 %
IT	25,865	(0.6) %	114.7 %	Pharma	12,496	(2.0) %	77.8 %
Metals	3,155	(2.5) %	103.1 %	Finance	14,724	(2.8) %	64.6 %
Auto	10,210	(2.1) %	119.2 %	PSU	1,816	(1.5) %	41.5 %
FMCG	34,281	0.3 %	30.1 %	Real Estate	311	(2.2) %	80.7 %

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>
United Bre	1,301	4.2 %	46.3 %	Info Edg.(4,708	(5.6) %	133.8 %
L & T Info	4,026	3.4 %	189.2 %	SBI Cards	970	(5.0) %	59.5 %
Container	433	2.8 %	36.4 %	Tata Motor	268	(4.2) %	293.7 %
Tech Mahin	997	2.6 %	95.1 %	DLF	259	(4.1) %	95.2 %
SBI Life I	882	2.2 %	38.8 %	ICICI Lomb	1,379	(4.1) %	24.7 %

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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