



29 Jan.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,152	0.8 %	4.1 %
BSE SENSEX	40,967	(0.5) %	6.1 %
CNX BANK	31,006	0.8 %	2.2 %
CNX MIDCAP	18,396	0.9 %	0.3 %
CNX SMALLCAP	6,380	0.7 %	(5.3) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,723	0.7 %	0.6 %
S&P 500	3,276	1.0 %	1.4 %
FTSE 100	7,481	0.9 %	(1.6) %
HANG SENG	27,950	0.2 %	(2.1) %
NIKKEI	23,216	(0.6) %	0.0 %
SHANGHAI COMPOSITE	2,977	(2.8) %	(3.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.33	0.3 %	0.2 %
EUR/USD	1.10	0.0 %	(1.7) %
GBP/USD	1.31	(0.0) %	(0.9) %
USD/JPY	108.98	(0.3) %	0.3 %
USD/AUD	1.48	0.7 %	3.5 %
USD/SGD	1.36	0.3 %	0.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	0.6 %	(12.6) %
Gold(INR/10g)	40,456	(0.4) %	3.7 %
Gold Comex(USD/oz)	1,564	(1.1) %	1.4 %
SILVER(INR/1Kg)	46,573	(1.6) %	1.1 %
Aluminium(USD/MT)	1,745	(0.6) %	(1.6) %
Copper(USD/MT)	5,715	(1.1) %	(7.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.7	0.0 %	(0.3) %

Global Economy: Consumer confidence in the US showed a notable improvement in the month of January, the Conference Board revealed in a report released on Tuesday. The Conference Board said its consumer confidence index rose to 131.6 in January from an upwardly revised 128.2 in December. US durable goods orders surged up by 2.4% in December after tumbling by a revised 3.1% in November, according to a report released by the Commerce Department on Tuesday. UK retailers reported that sales volumes were flat for the third consecutive month in January and they expect no growth for next month, according to Distributive Trends Survey published by the Confederation of British Industry. The retail sales balance held steady at zero percent in January and the balance is expected to remain at zero percent in February. Producer prices in Japan rose 2.1% on year in December, the Bank of Japan said on Tuesday, unchanged from the previous month. Producer prices were flat on month after adding 0.2% in November. For all of 2019, producer prices were up 1.1% on year - easing slightly from the 1.2% annual increase in 2018. Australia's business conditions weakened marginally in December, reflecting that activity stabilized in the fourth quarter, survey data from National Australia Bank showed Tuesday. The business conditions index slipped one point to +3 in December. The indicator has remained below average and was also well below the level seen in early 2018.

Global Equities: DOW jumped as WHO noted that the coronavirus is not yet an international emergency.

Indian Economy: The Automotive Component Manufacturers Association (ACMA), the apex body of the Indian auto component industry reiterated the need for a uniform 18% GST rate on all auto components in its recommendations for the Union Budget 2020. Given the sector is challenged due to the prolonged slowdown, the industry association that represents over 850 companies in the auto component sector recommended, supportive measures that would enable revival of automotive growth and a smooth transition to the next phase in the year to come. Rajasree Ray, Economic Adviser, Ministry of Finance, Govt of India, today said that India, which is aiming for \$5 trillion economy by 2024-25, needs to ensure that investments made in the economy are sustainable in terms of low carbon emission. Speaking at 'India-UK Dialogue: Supercharging Sustainable Finance in India', organised by FICCI in collaboration with UK's Foreign & Commonwealth Office', the City of London and Climate Bonds Initiative, Ray said that sustainable finance is no longer in the margins of discourse, but serious effort is being made to mainstream it.

Equity Markets: Domestic shares declined for a second straight session on Tuesday amid weak global sentiment. Global stock markets were under pressure after the death toll and incidence rate of the Chinese coronavirus escalated over the weekend. Investors also turned cautious ahead of the Union Budget on Saturday, 1 February 2020.

Corporate News: Central Bank of India reported net profit of Rs 155.32 crore against a loss of Rs 718.23 crore on 15.00% rise in total income to Rs 7,278.29 crore in Q3 December 2019 over Q3 December 2018. In a new set up, 7 Stressed Asset Management Branches (for stressed assets above Rs 25 crore) and 8 Asset Recovery Branches (for stressed assets of Rs 5-25 crore) are reporting directly to Corporate Office for ensuring faster resolution. Infosys informed that with regard to the minority investment made during 2016 in Unsilo A/S, the company announced that it has, on 28 January 2020, completed the divestment of its shares in Unsilo A/S for a total consideration of approximately \$ 0.8 million. Tata Coffee said that the board of directors has approved disposal of upto 1,60,000 equity shares of Rs 10 each held by the company in Tata Chemicals, through secondary market. Allcargo Logistics informed that the company has till now acquired 2,54,03,340 equity shares i.e. 20.83% stake of Gati.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(24.4)	115.1	47.6
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)	2,770	34,852	37,087
F&O(INR cr)	1,565,782	1,648,645	1,380,583

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.3	13.4	14.9
NSE VIX	17.3	14.7	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	30,761	(0.2) %	1.4 %	Energy	15,363	(0.8) %	(7.1) %
IT	16,430	0.2 %	3.7 %	Pharma	8,420	0.0 %	(10.2) %
Metals	2,642	(2.5) %	(14.8) %	Finance	14,273	0.3 %	14.2 %
Auto	8,156	(1.2) %	(3.1) %	PSU	2,371	(0.9) %	(30.0) %
FMCG	31,027	(0.4) %	2.8 %	Real Estate	327	0.0 %	22.4 %

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 Spi	656	13.9 %	19.4 %	Vodafone I	5	(7.8) %	(69.9) %
B P C L	481	2.8 %	22.7 %	Bharti Air	491	(4.5) %	57.0 %
H D F C	2,432	1.5 %	24.1 %	Vedanta	142	(4.5) %	(24.7) %
Divi's Lab	1,947	1.5 %	13.0 %	Page Indus	25,145	(4.4) %	(1.5) %
United Bre	1,277	1.2 %	(9.6) %	Tata Steel	446	(3.5) %	(16.6) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
ANZ Roy Morgan Weekly Consumer Confidence Index (JAN 26)	29-01-2020	4:00	AUD	-	108.3
Westpac Leading Index (MoM) (DEC)	29-01-2020	5:30	AUD	-	(0.0009)
Consumer Prices Index (YoY) (4Q)	29-01-2020	6:00	AUD	-	0.017
Credit Suisse Survey Expectations (JAN)	29-01-2020	14:30	CHF	-	12.5
German GfK Consumer Confidence (FEB)	29-01-2020	12:30	EUR	-	9.6
BRC Shop Price Index (YoY) (JAN)	29-01-2020	5:31	GBP	-	(0.004)
Consumer Confidence Index (JAN)	29-01-2020	10:30	JPY	-	39.1
BOJ Summary of Opinions	29-01-2020	5:20	JPY	-	-
BOJ Outright Bond Purchase 1~3 Years	29-01-2020	6:40	JPY	-	-
MBA Mortgage Applications (JAN 24)	29-01-2020	17:30	USD	-	(0.012)
Advance Goods Trade Balance (DEC)	29-01-2020	19:00	USD	-	-
Pending Home Sales (YoY) (DEC)	29-01-2020	20:30	USD	-	0.056
DOE U.S. Crude Oil Inventories (JAN 24)	29-01-2020	21:00	USD	-	-

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