



29 Jan.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	13,818	(1.1) %	67.4 %
BSE SENSEX	46,874	(1.1) %	65.8 %
CNX BANK	30,358	0.2 %	66.7 %
CNX MIDCAP	20,990	(0.6) %	83.0 %
CNX SMALLCAP	7,222	(0.7) %	104.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,603	1.0 %	(0.0) %
S&P 500	3,787	1.0 %	0.8 %
FTSE 100	6,526	(0.6) %	(0.7) %
HANG SENG	28,551	(2.6) %	3.9 %
NIKKEI	28,197	(1.5) %	3.4 %
SHANGHAI COMPOSITE	3,505	(1.9) %	0.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.95	0.1 %	(0.0) %
EUR/USD	1.21	(0.4) %	(1.1) %
GBP/USD	1.37	0.3 %	0.5 %
USD/JPY	103.90	0.1 %	0.7 %
USD/AUD	1.30	0.0 %	0.0 %
USD/SGD	1.33	(0.1) %	0.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(1.0) %	9.9 %
Gold(INR/10g)	48,819	0.0 %	(4.3) %
Gold Comex(USD/oz)	1,844	(0.0) %	(5.4) %
SILVER(INR/1Kg)	65,795	0.1 %	(4.5) %
Aluminium(USD/MT)	1,979	(1.2) %	(1.7) %
Copper(USD/MT)	7,779	(1.5) %	(1.8) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.1	0.0 %	0.1 %

Global Economy: The US Commerce Department said real gross domestic product jumped by 4% in the fourth quarter after soaring by 33.4% in the third quarter. The GDP for 2020 contracted by 3.5% following the 2.2% growth seen in 2019. The US new home sales rose by 1.6% to an annual rate of 842,000 in December after plunging by 12.6% to a revised rate of 829,000 in November. Eurozone economic sentiment weakened in January driven by sliding confidence in retail trade and services as Covid-19 containment measures remain in place, survey results from the European Commission showed Thursday. The economic sentiment index fell to 91.5 from 92.4 in the previous month. UK car production fell to the lowest in 36 years in 2020 amid the coronavirus pandemic, the Society of Motor Manufacturers and Traders, or SMMT, reported Thursday. Car production decreased 29.3% to 920,928 units in 2020. This was the lowest output since 1984. Production for local market fell 30.4% and that for exports decreased 29.1% from the last year. Overall car production was down 2.3% to 71,403 in December. Japan retail sales was down 0.3% on year in December coming in at 14.434 trillion yen, the Ministry of Economy, Trade and Industry said on Thursday, following the downwardly revised 0.6% increase in November (originally 0.7%). Australia export prices were up 5.5% on quarter in the fourth quarter of 2020, the Australian Bureau of Statistics said on Thursday, following the 5.1% drop in Q3. Import prices sank 1% on quarter after sinking 3.5% in the three months prior. On a yearly basis, export prices were up 0.3% and import prices tumbled 7.3%.

Global Equities: US stocks spiked in volatile trades as traders braced for continued monetary and fiscal stimulus.

Indian Economy: The Reserve Bank Of India (RBI) has reported that currency in circulation stood almost flat on the week to stand at Rs 28.11 lakh crore as on January 8th 2021. The central bank stated further that the overall reserve money eased by 0.6% on the week to Rs 33.51 lakh crore. Currency in circulation rose around 21.8% on a year ago basis compared to 11.90% growth at the same time last year. In the current fiscal, the currency in circulation has expanded by 14.90% so far while the reserve money has increased by 10.6%. With a consistent rise in cumulative recoveries, India's Recovery Rate has reached nearly 97%. India's recovery rate is one of the highest globally. 1,03,73,606 people have recovered. India's total Active Caseload has dropped to less than 1.75 lakh. The active caseload now consists of just 1.62% of India's total Positive Cases.

Equity Markets: The domestic equity benchmarks ended with steep losses on Thursday. Barring few bank stocks, shares declined across sectors. Trading was volatile as the January 2021 F&O contracts expired today, 28 January 2021. Global cues were weak as rising coronavirus cases and uneven distribution of vaccine rollouts triggered selling pressure.

Corporate News: Telecom stocks will be in focus. The government on Thursday eased the path for 5G rollout in the country by reducing to six months the notice period for offering any new technology using the spectrum being put up for auction in March. Pidilite Industries reported consolidated revenue at Rs 2,299.02 crore in Q3 FY21 against Rs 1,926.59 crore YoY. Profit came in at Rs 441.83 crore against Rs 341.78 crore YoY. United Breweries consolidated revenue was reported at Rs 3,065.89 crore against Rs 3,254.07 crore YoY. Profit was at Rs 126.78 crore against Rs 106.68 crore YoY. Tata Chemicals reported income from operations on consolidated basis at Rs 2,606 crore in Q3 FY21, down 0.7% YoY. PAT stood at Rs 161 crore, down Rs 6 crore from the same period last year.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(92.4)	171.7	162.9
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)	76,646	73,747	59,911
F&O(INR cr)	7,723,189	3,690,495	2,234,702

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	30.2	24.5	28.7
NSE VIX	24.3	22.3	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	30,358	0.2 %	66.7 %	Energy	16,460	(0.1) %	52.8 %
IT	25,301	(2.2) %	110.0 %	Pharma	12,396	(0.8) %	76.4 %
Metals	3,138	(0.5) %	102.0 %	Finance	14,603	(0.8) %	63.3 %
Auto	10,106	(1.0) %	117.0 %	PSU	1,784	(1.8) %	39.0 %
FMCG	33,626	(1.9) %	27.6 %	Real Estate	304	(2.2) %	76.7 %

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>
Axis Bank	671	6.1 %	87.0 %	Bank of Ba	67	(9.9) %	30.2 %
Havells In	1,182	5.9 %	143.9 %	United Spi	594	(7.8) %	28.4 %
Bandhan Ba	311	2.5 %	59.6 %	Hind. Unil	2,300	(3.8) %	5.5 %
St Bk of I	282	2.4 %	51.4 %	Info Edg.(4,537	(3.6) %	125.3 %
H P C L	222	2.2 %	20.4 %	Maruti Suz	7,589	(3.6) %	78.7 %

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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