



29 Dec.2020

**INDEX PERFORMANCE**

| INDIAN INDICES     | LATEST | % 1D    | % YTD    |
|--------------------|--------|---------|----------|
| CNX NIFTY          | 13,873 | 0.9 %   | 68.1 %   |
| BSE SENSEX         | 47,354 | 0.8 %   | 67.5 %   |
| CNX BANK           | 30,881 | 1.6 %   | 69.6 %   |
| CNX MIDCAP         | 20,719 | 1.2 %   | 80.6 %   |
| CNX SMALLCAP       | 7,018  | 1.7 %   | 98.2 %   |
| GLOBAL INDICES     | LATEST | % 1D    | % YTD    |
| DOW JONES          | 30,404 | 0.7 %   | 6.5 %    |
| S&P 500            | 3,735  | 0.9 %   | 15.6 %   |
| FTSE 100           | 6,502  | 0.1 %   | (14.5) % |
| HANG SENG          | 26,315 | (0.3) % | (7.8) %  |
| NIKKEI             | 26,854 | 0.7 %   | 15.7 %   |
| SHANGHAI COMPOSITE | 3,397  | 0.0 %   | 10.1 %   |

**FOREX RATES**

|         | LATEST | % 1D    | % YTD   |
|---------|--------|---------|---------|
| USD/INR | 73.41  | (0.6) % | 3.1 %   |
| EUR/USD | 1.22   | (0.2) % | 8.6 %   |
| GBP/USD | 1.36   | 1.3 %   | 2.9 %   |
| USD/JPY | 103.72 | 0.2 %   | (4.5) % |
| USD/AUD | 1.32   | (0.6) % | (7.6) % |
| USD/SGD | 1.33   | (0.4) % | (1.2) % |

**COMMODITIES**

|                    | LATEST | % 1D  | % YTD    |
|--------------------|--------|-------|----------|
| WTI Crude(USD/bbl) | 48     | 0.0 % | (21.0) % |
| Gold(INR/10g)      | 49,866 | 0.2 % | 27.9 %   |
| Gold Comex(USD/oz) | 1,895  | 0.2 % | 22.8 %   |
| SILVER(INR/1Kg)    | 67,415 | 1.8 % | 46.4 %   |
| Aluminium(USD/MT)  | 2,049  | 1.0 % | 15.6 %   |
| Copper(USD/MT)     | 7,964  | 0.9 % | 29.2 %   |

**FIXED INCOME**

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec India | 8.1    | 0.1 %  | (0.0) % |
| 10 Y GSec US 10 | 0.9    | 0.0 %  | (1.0) % |

**Global Economy:** China's industrial profits increased 15.5% on a yearly basis in November, following a 28.2% surge posted in October, data released by the National Bureau of Statistics showed over the weekend. The slowdown in November was largely driven by a higher base compared with October, the statistical office said. During January to November period, profits of industrial firms climbed 2.4% from the same period last year. Japan industrial output was flat on a seasonally adjusted basis in November, the Ministry of Economy, Trade and Industry (METI) said on Monday, following the 4% gain in October. On a yearly basis, industrial production sank 3.4%, following the 3% drop in the previous month. Upon the release of the data, the METI maintained its assessment of industrial production, saying that it is picking up. Industries that increased included production machinery, business-oriented machinery and iron and steel. According to the METI's forecast of industrial production, output is expected to sink 1.1% in December and then spike 7.1% in January.

**Global Equities:** Sentiment was upbeat after the US President Trump signed a \$2.3 trillion pandemic aid while the UK and the EU struck a Brexit trade deal.

**Indian Economy:** The opening up of the economy and implementation of a broad set of measures under the Atmanirbhar Bharat package have led to a continuous improvement over time in the performance of businesses. Findings of the FICCI-Dhruva Advisors Survey conducted in December 2020 confirm this trend and show that members of India Inc are expecting even better results in 2021. The prospect of an introduction of a vaccine for COVID-19 early next year has improved the confidence level of businesses. Almost 74 percent of the survey participants have said that they foresee a significant positive impact on their business once the vaccine is made available. Maintaining 4% inflation is appropriate for India as targeting a lower rate could impart deflationary bias to the monetary policy, said a Reserve Bank paper. Under the current dispensation, the RBI has been mandated by the government to maintain retail inflation at 4% with a margin of 2% on either side, noted the paper, authored by RBI Deputy Governor Michael Debabrata Patra and another official Harendra Kumar Behera.

**Equity Markets:** The domestic equity benchmarks ended near the day's high on Monday, supported by positive global cues. Barring the Nifty Pharma index, all the other sectoral indices on the NSE ended in the green. Banks, metals and realty stocks rallied.

**Corporate News:** Punjab National Bank (PNB) on Monday said it has completed IT integration of all branches of erstwhile United Bank of India with itself. The telecom industry, which facilitated wide-spread digital adoption during the pandemic, continues to be financially stressed and seeks government support on issues like liquidity, rationalisation of levies, AGR and spectrum pricing, according to COAI. Biocon has expanded its generic formulations portfolio with the launch of Tacrolimus capsules in the US. GE Shipping has delivered its 2000 built Suezmax Crude Carrier "Jag Lateef" to the buyers.



### FUND FLOWS

|             | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (68.4)        | 354.6      | 160.7      |
| MF(INR cr)  | (1,156.3)     | (1,490.2)  | (493.3)    |

### MARKET TURNOVER

|              | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 51,257        | 67,983         | 58,529         |
| F&O(INR cr)  | 1,639,885     | 2,947,534      | 2,060,567      |

### MARKET VOLATILITY

|          | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 21.6          | 21.9           | 29.2           |
| NSE VIX  | 20.4          | 19.6           | 26.5           |

### NSE INDICES / SECTORAL PERFORMANCE

|        | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |             | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks  | 30,881        | 1.6 %       | 69.6 %       | Energy      | 17,006        | 0.9 %       | 57.9 %       |
| IT     | 24,100        | 0.4 %       | 100.1 %      | Pharma      | 12,874        | (0.3) %     | 83.2 %       |
| Metals | 3,225         | 2.6 %       | 107.6 %      | Finance     | 14,966        | 1.3 %       | 67.4 %       |
| Auto   | 9,067         | 1.0 %       | 94.7 %       | PSU         | 1,750         | 2.7 %       | 36.4 %       |
| FMCG   | 34,181        | 0.2 %       | 29.7 %       | Real Estate | 307           | 2.6 %       | 78.4 %       |

### 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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Tata Motor         | 186           | 5.9 %       | 174.2 %      | Biocon            | 466           | (3.4) %     | 67.3 %       |
| JSW Steel          | 387           | 5.6 %       | 170.3 %      | Oracle Fin        | 3,182         | (1.2) %     | 65.6 %       |
| Motherson          | 161           | 4.3 %       | 177.2 %      | P & G Hygi        | 10,970        | (1.1) %     | 5.4 %        |
| United Bre         | 1,164         | 3.3 %       | 30.8 %       | Indus Towe        | 237           | (0.9) %     | 52.8 %       |
| HDFC Life          | 679           | 3.3 %       | 57.9 %       | Sun Pharma        | 587           | (0.6) %     | 70.8 %       |

### 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> |             |                  |               |               |                       |

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