



30 Jan.2020

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,130	0.6 %	3.9 %
BSE SENSEX	41,199	0.6 %	6.0 %
CNX BANK	30,877	0.4 %	1.8 %
CNX MIDCAP	18,273	0.2 %	(0.3) %
CNX SMALLCAP	6,328	(0.2) %	(6.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,734	0.0 %	0.7 %
S&P 500	3,273	(0.1) %	1.3 %
FTSE 100	7,484	0.0 %	(1.6) %
HANG SENG	27,161	(2.8) %	(4.8) %
NIKKEI	23,379	0.7 %	0.8 %
SHANGHAI COMPOSITE	2,977	(2.8) %	(3.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.21	0.1 %	0.0 %
EUR/USD	1.10	(0.1) %	(1.8) %
GBP/USD	1.30	(0.3) %	(1.2) %
USD/JPY	109.04	(0.2) %	0.4 %
USD/AUD	1.48	1.0 %	3.8 %
USD/SGD	1.36	0.5 %	0.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	0.6 %	(12.6) %
Gold(INR/10g)	40,312	(0.4) %	3.4 %
Gold Comex(USD/oz)	1,564	(1.1) %	1.4 %
SILVER(INR/1Kg)	45,478	(2.4) %	(1.3) %
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: The US Federal Reserve announced its decision to leave interest rates unchanged following the conclusion of its two-day monetary policy meeting on Wednesday. The Fed decided to maintain the target range for the federal funds rate at 1-1/2 to 1-3/4 percent, keeping rates unchanged for the second straight meeting after three straight quarter-point rate cuts. The accompanying statement was largely unchanged from last month, with the Fed noting that recent data indicates the labor market remains strong and that economic activity has been rising at a moderate rate. The industrial efficiency throughout G7 countries and main emerging markets is expected to be muted in fall of 2019 owing to international business tensions and sharp deceleration in actual GDP expansion in the United States, China and India. The EIU stated in a document on Wednesday, according to media reports. Germany's consumer confidence is set to improve in February amid further improvement in economic and income expectations, and private consumption in forecast to grow 1% in 2020, results of a survey by the market research group GfK showed Wednesday. The forward-looking GfK consumer confidence index for February rose to 9.9 points from 9.7 in January, which was revised from 9.6.

Global Equities: The US stocks slipped on renewed concerns about the impact of the coronavirus outbreak.

Indian Economy: Union Minister for Road Transport & Highways and MSMEs Nitin Gadkari has called for including the road projects in the country into the ambit of insurance. He said, several countries in the world are following the practice of insuring infrastructure projects. These include Canada, Australia, USA, South Africa and UK. Domestic bond markets stayed choppy as traders focused on the budget. The benchmark 10 year G sec, 6.45% bond yield closed at 6.57%, unchanged on the day.

Equity Markets: Key barometers ended with modest gains after a fairly range bound session on Wednesday. Recovery in global stock markets boosted sentiment. However, gains were capped ahead of January F&O expiry on Thursday and the Union Budget on Saturday.

Corporate News: Bajaj Finserv's consolidated net profit jumped 32.34% to Rs 1,125.64 crore on a 30.68% surge in total income to Rs 14,560.74 crore in Q3 December 2019 over Q3 December 2018. Bajaj Finserv remains a debt free company and its surplus funds (excluding group investments) stood at Rs 910 crore as of 31 December 2019 as compared to Rs 830 crore on 31 December 2018. HDFC Bank has informed that the Reserve Bank of India (RBI) imposed a monetary penalty of Rs 1 crore on the Bank for failure to undertake on-going due diligence in case of 39 current accounts opened for bidding in Initial Public Offer. Tata Power Company's consolidated net profit rose 26.08% to Rs 178.86 crore on a 10.11% fall in total income to Rs 7,416.25 crore in Q3 December 2019 over Q3 December 2018. Net profit rose mainly due to lower fuel under recovery in Mundra and better operational performance by all businesses.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(110.2)	104.4	46.8
MF(INR cr)	(152.6)	1.0	251.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	40,306	35,112	37,102
F&O(INR cr)	1,736,105	1,652,810	1,382,326

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.3	13.4	14.9
NSE VIX	16.5	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	30,877	0.4 %	1.8 %	Energy	15,452	0.6 %	(6.5) %
IT	16,479	0.3 %	4.0 %	Pharma	8,413	(0.1) %	(10.3) %
Metals	2,666	0.9 %	(14.1) %	Finance	14,347	0.5 %	14.8 %
Auto	8,220	0.8 %	(2.3) %	PSU	2,378	0.3 %	(29.7) %
FMCG	31,426	1.3 %	4.1 %	Real Estate	329	0.5 %	22.9 %

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	188	6.8 %	0.4 %	Eicher Mot	20,192	(4.2) %	0.7 %
Bajaj Fin.	4,419	4.9 %	47.2 %	NHPC Ltd	26	(4.2) %	4.4 %
Bajaj Hold	3,417	4.7 %	1.9 %	United Spi	635	(3.2) %	15.5 %
Tata Motor	78	4.7 %	(16.0) %	Bandhan Ba	451	(2.4) %	(14.9) %
Bharti Inf	245	3.2 %	(22.0) %	Vodafone I	5	(1.9) %	(70.4) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Export Price Index (QoQ) (4Q)	30-01-2020	6:00	AUD	-	0.013
CFIB Business Barometer (JAN)	30-01-2020	16:30	CAD	-	55.5
KOF Leading Indicator (JAN)	30-01-2020	13:30	CHF	-	96.4
German Unemployment Change (000's) (JAN)	30-01-2020	14:25	EUR	-	-
Euro-Zone Unemployment Rate (DEC)	30-01-2020	15:30	EUR	-	0.075
German Consumer Price Index (YoY) (JAN P)	30-01-2020	18:30	EUR	-	0.015
BOE Asset Purchase Target (JAN)	30-01-2020	17:30	GBP	-	-
BOE's Carney speaks at press conference in London	30-01-2020	18:00	GBP	-	-
Lloyds Business Barometer (JAN)	30-01-2020	5:31	GBP	-	10
BOJ Deputy Governor Amamiya Speech	30-01-2020	12:30	JPY	-	-
Loans & Discounts Corp (YoY) (DEC)	30-01-2020	5:20	JPY	-	0.0202
Trade Balance (DEC)	30-01-2020	3:15	NZD	-	-
FOMC Rate Decision (Lower Bound) (JAN 29)	30-01-2020	0:30	USD	-	0.015
Powell Holds Post-FOMC meeting Press Conference	30-01-2020	1:00	USD	-	-
Gross Domestic Product Annualized (QoQ) (4Q A)	30-01-2020	19:00	USD	-	0.021
EIA Natural Gas Storage Change (JAN 24)	30-01-2020	21:00	USD	-	(92)

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