



INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	13,933	0.4 %	68.8 %
BSE SENSEX	47,613	0.5 %	68.5 %
CNX BANK	31,323	1.4 %	72.0 %
CNX MIDCAP	20,696	(0.1) %	80.4 %
CNX SMALLCAP	7,017	(0.0) %	98.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,336	(0.2) %	6.3 %
S&P 500	3,727	(0.2) %	15.4 %
FTSE 100	6,603	1.6 %	(13.2) %
HANG SENG	26,568	1.0 %	(6.9) %
NIKKEI	27,568	2.7 %	18.8 %
SHANGHAI COMPOSITE	3,379	(0.5) %	9.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.44	(0.4) %	3.1 %
EUR/USD	1.22	0.2 %	8.9 %
GBP/USD	1.35	0.4 %	2.4 %
USD/JPY	103.65	0.1 %	(4.6) %
USD/AUD	1.32	(0.4) %	(7.6) %
USD/SGD	1.33	(0.3) %	(1.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.0 %	(21.0) %
Gold(INR/10g)	49,854	(0.0) %	27.8 %
Gold Comex(USD/oz)	1,895	0.2 %	22.8 %
SILVER(INR/1Kg)	67,005	(0.6) %	45.5 %
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: The S&P CoreLogic Case-Shiller US National Home Price NSA Index, covering all nine US census divisions, reported an 8.4% annual gain in October, up from 7.0% in the previous month. The 10-City Composite annual increase came in at 7.5%, up from 6.2% in the previous month. The 20-City Composite posted a 7.9% year-over-year gain, up from 6.6% in the previous month. The National Index posted a 1.4% month-over-month increase, while the 10-City and 20-City Composites both posted increases of 1.4% and 1.3% respectively, before seasonal adjustment in October. After seasonal adjustment, the National Index posted a month-over-month increase of 1.7%, while the 10-City and 20-City Composites both posted increases of 1.6%. In October, all 19 cities (excluding Detroit) reported increases before and after seasonal adjustment. Singapore's producer prices declined in November, data from the Department of Statistics showed on Tuesday. The manufacturing producer price index fell 8.8% year-on-year in November, following an 8.3% drop in October. Consumer confidence in South Korea tumbled in December, the Bank of Korea said after its Composite Consumer Sentiment Index (CCSI) came in with a score of 89.8 - down sharply from 97.9 in November.

Global Equities: Sentiments remained choppy for world markets as liquidity was thin ahead of the yearend and lack of major economic updates.

Indian Economy: The Reserve Bank of India released the Report on Trend and Progress of Banking in India 2019-20. The Report presents the performance of the banking sector, including co-operative banks, and non-banking financial institutions during 2019-20 and 2020-21 so far. During 2019-20 and first half of 2020-21, scheduled commercial banks (SCBs) consolidated the gains achieved after the turnaround in 2018-19, the report noted. SCBs' gross non-performing assets (GNPA) ratio declined from 9.1% at end-March 2019 to 8.2% at end-March 2020 and further to 7.5% at end-September 2020. Capital to risk weighted assets (CRAR) ratio of SCBs strengthened from 14.3 per cent at end-March 2019 to 14.7% at end-March 2020 and further to 15.8 per cent at end-September 2020, partly aided by recapitalisation of public sector banks and capital raising from the market by both public and private sector banks. Net profits of SCBs turned around in 2019-20 after losses in the previous two years; in H1:2020-21, their financial performance was shored up by the moratorium, standstill in asset classification and ploughing back of dividends.

Equity Markets: Local indices closed with decent gains on Tuesday. The Nifty managed to close above the crucial 13,900 mark. Buying was seen in bank, financial and IT stocks while metal, realty and auto shares corrected. Positive global cues supported the rally. The Sensex hit a fresh record high of 47,714.55 while the Nifty scaled an all-time high of 13,967.60 in morning trade. Investor sentiment was upbeat after President Trump signed a \$2.3 trillion pandemic aid while the UK and the EU struck a Brexit trade deal last week.

Corporate News: Ratings agency ICRA on Tuesday said it has revised its outlook on the auto component industry from negative to stable, on the back of demand revival across original equipment manufacturers (OEMs), replacements and exports. ICRA stated that the domestic auto component industry's revenue to grow 16-18% in the financial year starting April 2021. The Board of Directors of Jindal Stainless Limited (JSL) and Jindal Stainless (Hisar) Limited (JSHL) on Tuesday has approved the merger of JSHL into JSL. As per the approved share swap ratio, 195 equity shares of JSL will be issued for every 100 equity shares of JSHL. Profitability of non-banking finance companies (NBFCs) may be impacted due to loan impairment, lower credit demand and a tendency to preserve cash, noted the RBI.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	231.2	348.1	161.1
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)	55,142	67,307	58,511
F&O(INR cr)	2,391,918	2,919,753	2,062,348

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.6	21.9	29.2
NSE VIX	20.8	19.6	26.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,323	1.4 %	72.0 %	Energy	16,899	(0.6) %	56.9 %
IT	24,274	0.7 %	101.5 %	Pharma	12,844	(0.2) %	82.8 %
Metals	3,190	(1.1) %	105.3 %	Finance	15,120	1.0 %	69.1 %
Auto	9,044	(0.3) %	94.2 %	PSU	1,765	0.9 %	37.6 %
FMCG	34,182	0.0 %	29.7 %	Real Estate	306	(0.3) %	77.9 %

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>
IndusInd B	913	5.3 %	166.7 %	NMDC	114	(1.9) %	44.9 %
Indraprast	511	4.3 %	30.9 %	Coal India	135	(1.9) %	(3.1) %
Punjab Nat	33	2.5 %	9.0 %	NTPC	99	(1.8) %	21.7 %
Axis Bank	630	2.0 %	75.7 %	Nestle Ind	18,263	(1.8) %	16.7 %
Tech Mahin	966	2.0 %	88.9 %	Hindalco I	236	(1.8) %	157.1 %

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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