



31 Jan.2020

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,036	(0.8) %	3.1 %
BSE SENSEX	40,914	(0.7) %	5.3 %
CNX BANK	30,647	(0.7) %	1.1 %
CNX MIDCAP	18,128	(0.8) %	(1.1) %
CNX SMALLCAP	6,227	(1.6) %	(7.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,859	0.4 %	1.1 %
S&P 500	3,284	0.3 %	1.6 %
FTSE 100	7,382	(1.4) %	(2.9) %
HANG SENG	26,449	(2.6) %	(7.3) %
NIKKEI	22,978	(1.7) %	(1.0) %
SHANGHAI COMPOSITE	2,977	(2.8) %	(3.5) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.18	(0.2) %	(0.0) %
EUR/USD	1.10	(0.1) %	(1.9) %
GBP/USD	1.30	(0.4) %	(1.3) %
USD/JPY	109.13	0.1 %	0.5 %
USD/AUD	1.48	0.4 %	3.8 %
USD/SGD	1.36	0.3 %	1.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	(0.3) %	(12.8) %
Gold(INR/10g)	40,717	1.0 %	4.4 %
Gold Comex(USD/oz)	1,578	0.9 %	2.3 %
SILVER(INR/1Kg)	46,116	1.4 %	0.1 %
Aluminium(USD/MT)	1,733	(0.7) %	(2.2) %
Copper(USD/MT)	5,698	(0.3) %	(7.6) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.1 %	(0.0) %
10 Y GSec US 10	1.6	(0.1) %	(0.3) %

**Global Economy:** The US Commerce Department said real gross domestic product climbed by 2.1% in the fourth quarter, unchanged from the third quarter. According to market research firm IDC, the smartphone market in China declined 15% to 85.3 million units in Q4 2019, marking the 11th consecutive quarterly decline. It also hit the market's lowest level since Q1 2013. Throughout the year 2019, China market sold 369 million smartphone units, down 7% year-on-year. Eurozone economic confidence index rose more-than-expected to 102.8 in January from 101.3 in December, survey results from the European Commission revealed. This was the highest reading since June 2019. The improvement resulted from marked increases in confidence in the industry and construction sectors, while retailers were somewhat less confident. Confidence among consumers and in the services sector remained virtually unchanged in January. Euro area unemployment rate fell to 7.4% in December from 7.5% in November, data from Eurostat showed Thursday. This was the lowest since May 2008. Hong Kong's exports decreased at the fastest pace in a decade in 2019, a year in which widespread anti-government protests weighed on the economic activity. Exports fell 4.1% in 2019, which was the worst annual decline since 2009, the government said Thursday. Imports dropped 6.5%.

**Global Equities:** European stocks saw heavy losses as risk sentiment remained negative globally.

**Indian Economy:** The latest round of FICCI's Economic Outlook Survey puts forth the annual median GDP growth forecast for 2019-20 at 5.0%. While the median growth forecast for agriculture and allied activities has been put at 2.6% for 2019-20; the industry and services sector are expected to grow by 3.5% and 7.2% respectively during the current year. Growth is likely to improve to 5.5% in 2020-21 as per the projections. Concerns remain on India's external front with exports projected to contract in 2019-20, according to FICCI. Merchandise exports are expected to decline by 2.1%, while imports are expected to decline by 5.5% during the year. India's Gold demand fell 9% on year to 690.4 tonnes in 2019, the lowest since 2016, the WGC said in a report published on Thursday. A 17% y-o-y drop in Q4 generated a 24% decline for jewellery demand in second half of 2019.

**Equity Markets:** Domestic shares corrected sharply on Thursday amid weak global cues triggered by rising death toll from coronavirus spreading in China. Meanwhile, India on Thursday reported its first case of the novel coronavirus in Kerala, the government said in a statement. The patient, a student of the China's Wuhan University, is stable and in isolation at a hospital, a statement from the Health Ministry said. The barometer BSE S&P Sensex fell 241.63 points or 0.59% to 41,208.49, as per the provisional closing data. The Nifty 50 index fell 73.70 points or 0.61% to 12,129.50, as per the provisional closing data. Trading was also volatile due to expiry of monthly derivatives.

**Corporate News:** Tata Motors said consolidated net profit stood at Rs 1,738.30 crore against a loss of Rs 26992.54 crore on a 6.44% fall in total income to Rs 72,586.35 crore in Q3 December 2019 over Q3 December 2018. The financial performance was impacted due to the downturn coupled with the inventory corrections the company took to get ready for BS VI. Kotak Mahindra Bank has informed that RBI has (a) accepted promoters voting rights in the Bank to be capped to 20% of paid-up voting equity share capital (PUVESC) until 31 March 2020; (b) promoters' voting rights in the Bank to be capped to 15% of PUVESC from April 1, 2020 onwards; (c) promoters' shareholding in the Bank to be reduced to 26% of PUVESC of the Bank within six months from the date of final approval of the RBI. Persistent Systems reported 2.16% rise in consolidated net profit to Rs 87.93 crore on 3.75% rise in total income to Rs 957.50 crore in Q3 December 2019 over Q2 September 2019. In Technology Services Unit (TSU), the company saw a secular growth across BFSI, Healthcare & Life Sciences and ISVs as well as uniformed growth across top 20 customers.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(202.6)	90.4	45.6
MF(INR cr)	753.6	38.6	253.7

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	40,096	35,338	37,117
F&O(INR cr)	3,120,411	1,719,519	1,390,804

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.4	13.5	14.9
NSE VIX	16.8	14.8	16.4

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,647	(0.7) %	1.1 %	Energy	15,245	(1.3) %	(7.8) %
IT	16,328	(0.9) %	3.1 %	Pharma	8,237	(2.1) %	(12.1) %
Metals	2,629	(1.4) %	(15.3) %	Finance	14,290	(0.4) %	14.3 %
Auto	8,181	(0.5) %	(2.8) %	PSU	2,347	(1.3) %	(30.7) %
FMCG	30,936	(1.6) %	2.5 %	Real Estate	327	(0.4) %	22.4 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Avenue Sup	2,051	3.9 %	37.4 %	Godrej Con	684	(7.7) %	1.0 %
Bajaj Auto	3,146	1.7 %	7.9 %	Piramal En	1,578	(7.3) %	(40.0) %
Pidilite I	1,521	1.6 %	21.4 %	Colgate-Pa	1,396	(5.9) %	11.0 %
Power Fin.	120	1.2 %	(0.3) %	Shriram Tr	1,044	(5.7) %	(15.6) %
ICICI Bank	532	1.1 %	33.6 %	Aurobindo	480	(5.3) %	(39.4) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Private Sector Credit (YoY) (DEC)	31-01-2020	6:00	AUD	-	0.023
Bank of Canada's Beaudry Gives Speech in Quebec City	31-01-2020	1:45	CAD	-	-
Gross Domestic Product (YoY) (NOV)	31-01-2020	19:00	CAD	-	0.012
Retail Sales Real (YoY) (DEC)	31-01-2020	13:00	CHF	-	0
Manufacturing PMI (JAN)	31-01-2020	6:30	CNY	-	50.2
French Gross Domestic Product (YoY) (4Q P)	31-01-2020	12:00	EUR	-	0.014
German Retail Sales (YoY) (DEC)	31-01-2020	12:30	EUR	-	0.028
Italian Gross Domestic Product w.d.a. (YoY) (4Q P)	31-01-2020	14:30	EUR	-	0.003
Euro-Zone Consumer Price Index Core (YoY) (JAN P)	31-01-2020	15:30	EUR	-	0.013
ECB's Panetta, Schnabel, Mersch Attend Event in Berlin	31-01-2020	16:30	EUR	-	-
Consumer Credit (YoY) (DEC)	31-01-2020	15:00	GBP	-	0.057
GfK Consumer Confidence (JAN)	31-01-2020	5:31	GBP	-	(11)
Construction Orders (YoY) (DEC)	31-01-2020	10:30	JPY	-	(0.012)
Jobless Rate (DEC)	31-01-2020	5:00	JPY	-	0.022
Industrial Production (YoY) (DEC P)	31-01-2020	5:20	JPY	-	(0.082)
Vehicle Production (YoY) (NOV)	31-01-2020	9:30	JPY	-	-
ANZ Consumer Confidence (MoM) (JAN)	31-01-2020	2:30	NZD	-	0.022
Chicago Purchasing Manager (JAN)	31-01-2020	20:15	USD	-	48.9
U. of Mich. Sentiment (JAN F)	31-01-2020	20:30	USD	-	99.1
Baker Hughes U.S. Rig Count (JAN 31)	31-01-2020	23:30	USD	-	794

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