



31 Jan.2023

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,741	0.5 %	0.4 %
BSE SENSEX	59,500	0.3 %	0.8 %
CNX BANK	40,387	0.0 %	8.7 %
CNX MIDCAP	30,186	0.0 %	0.2 %
CNX SMALLCAP	9,233	0.0 %	(13.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,717	(0.8) %	1.8 %
S&P 500	4,018	(1.3) %	5.1 %
FTSE 100	7,785	0.3 %	3.1 %
HANG SENG	22,070	(2.7) %	9.6 %
NIKKEI	27,433	0.2 %	6.7 %
SHANGHAI COMPOSITE	3,269	0.1 %	4.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	81.51	(0.1) %	(1.4) %
EUR/USD	1.09	(0.1) %	1.6 %
GBP/USD	1.24	0.3 %	2.5 %
USD/JPY	129.86	(0.3) %	(1.0) %
USD/AUD	1.41	(1.0) %	(4.1) %
USD/SGD	1.31	(0.5) %	(2.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	78	(3.8) %	1.3 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,941	(0.2) %	5.5 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,577	(0.8) %	10.2 %
Copper(USD/MT)	9,227	(1.3) %	10.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.6	0.0 %	(0.3) %

Global Economy: The manufacturing sector in China turned to expansion in December, the latest survey from the National Bureau of Statistics reported with a manufacturing PMI score of 50.1. That was up from 47.0 in November, moving it above the boom-or-bust line of 50 that separates expansion from contraction. The bureau also said that its non-manufacturing PMI came in at 54.4 - also up sharply from 41.6 in the previous month. The composite index posted a score of 52.9, up from 42.6 a month earlier. The German economy contracted at the end of the year, damping the possibility of the euro area skirting a technical recession, as suggested by recent surveys. Gross domestic product logged an unexpected quarterly fall of 0.2 percent, reversing the revised 0.5 percent expansion in the third quarter, preliminary data from Destatis revealed Monday. Industrial production in Japan was down a seasonally adjusted 0.1 percent on month in December, the Ministry of Economy, Trade and Industry reported. On a yearly basis, industrial production slumped 2.8 percent, missing forecasts for a fall of 2.0 percent following the 0.9 percent gain in the previous month. The unemployment rate in Japan came in at a seasonally adjusted 2.5 percent in December, the Ministry of Internal Affairs and Communication said on Tuesday. The value of retail sales in Australia was down a seasonally adjusted 3.9 percent on month in December, the Australian Bureau of Statistics reported- coming in at A\$34.472 billion.

Global Indices: The Dow ended down 260.99 points or 0.77 percent at 33,717.09, the S&P 500 settled lower by 52.79 points or 1.3 percent at 4,017.77, while the Nasdaq closed with a loss of 227.90 points or 1.96 percent at 11,393.81.

Indian Economy: India's forex reserves increased by USD 1.727 billion to USD 573.727 billion in the week ended January 20, the Reserve Bank of India said on Friday. This is the second consecutive week of a rise in the kitty after the USD 10.417 billion jump to USD 572 billion during the preceding week. In October 2021, the country's forex kitty had reached an all-time high of USD 645 billion. The reserves have been declining as the central bank deploys the kitty to defend the rupee amid pressures caused majorly by global developments.

Equity Market: The barometer index, the S&P BSE Sensex advanced 169.51 points or 0.29% to 59,500.41. The Nifty 50 index added 44.60 points or 0.25% to 17,648.95.

Corporate News: Larsen & Toubro (L&T) posted a consolidated net profit of Rs 2,553 crore in Q3 FY23, registering a growth of 24% from Rs 2,055 crore recorded in Q3 FY22. The conglomerate recorded revenues of Rs 46,390 crore for the quarter ended 31 December 2022, recording a YoY growth of 17%, aided by improved execution in the Infrastructure Projects segment and continued growth momentum in the IT&TS portfolio. International revenues during the quarter at Rs 17,317 crore constituted 37% of the total revenue. Mazagon Dock Shipbuilders reported 55% jump in standalone net profit to Rs 337 crore on a 17% increase in revenue from operations to Rs 1,816 crore in Q3 FY23 over Q3 FY22.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(752.5)	(125.9)	(29.1)
MF(INR cr)	(1,654.5)	544.3	627.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	4,834	38,438	50,330
F&O(INR cr)	13,519,142	20,333,171	14,026,452

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.9	20.2	25.2
NSE VIX	17.7	14.9	18.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	40,387	0.1 %	8.7 %	Energy	23,435	(3.0) %	(11.4) %
IT	30,095	1.1 %	(17.2) %	Pharma	12,484	(0.2) %	(8.1) %
Metals	6,372	(0.3) %	(1.6) %	Finance	18,091	0.3 %	3.6 %
Auto	13,077	(0.1) %	22.5 %	PSU	3,842	0.6 %	35.5 %
FMCG	44,220	(0.6) %	20.5 %	Real Estate	407	(0.1) %	(14.2) %

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>
Indus Towe	147	7.3 %	(33.6) %	Adani Gree	1,189	(20.0) %	(38.9) %
FSN E-Comm	134	6.3 %	(52.6) %	Adani Tota	2,342	(20.0) %	4.1 %
Adani Ente	2,893	4.8 %	41.6 %	Adani Tran	1,708	(15.2) %	(29.5) %
Bajaj Fina	6,022	4.5 %	(18.7) %	Bharat Ele	89	(5.7) %	24.1 %
One 97	534	4.0 %	(6.5) %	GAIL (Indi	95	(4.2) %	(12.1) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Private Sector Credit m/m	31-01-2023	06:00	AUD	-	0.005
GDP m/m	31-01-2023	19:00	CAD	-	0.001
Retail Sales y/y	31-01-2023	13:00	CHF	-	(0.013)
Manufacturing PMI	31-01-2023	07:00	CNY	-	47
French Consumer Spending m/m	31-01-2023	12:00	EUR	-	0.005
German Import Prices m/m	31-01-2023	12:30	EUR	-	(0.045)
French Prelim CPI m/m	31-01-2023	13:15	EUR	-	(0.001)
German Unemployment Change	31-01-2023	14:25	EUR	-	-
Italian Monthly Unemployment Rate	31-01-2023	14:30	EUR	-	0.078
Prelim Flash GDP q/q	31-01-2023	15:30	EUR	-	0.003
M4 Money Supply m/m	31-01-2023	15:00	GBP	-	(0.016)
Unemployment Rate	31-01-2023	05:00	JPY	-	0.025
Prelim Industrial Production m/m	31-01-2023	05:20	JPY	-	0.002
Consumer Confidence	31-01-2023	10:30	JPY	-	30.3
HPI m/m	31-01-2023	19:30	USD	-	0
Chicago PMI	31-01-2023	20:15	USD	-	44.9
CB Consumer Confidence	31-01-2023	20:30	USD	-	108.3

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