



31 Dec.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	12,223	(0.3) %	4.7 %
BSE SENSEX	41,558	(0.0) %	6.7 %
CNX BANK	32,220	(0.4) %	6.2 %
CNX MIDCAP	17,104	0.2 %	(6.7) %
CNX SMALLCAP	5,807	0.2 %	(13.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	28,462	(0.6) %	22.0 %
S&P 500	3,221	(0.6) %	28.5 %
FTSE 100	7,587	(0.8) %	12.7 %
HANG SENG	28,319	0.3 %	12.7 %
NIKKEI	23,657	(0.8) %	20.9 %
SHANGHAI COMPOSITE	3,040	1.2 %	23.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.29	0.3 %	2.7 %
EUR/USD	1.12	0.8 %	(2.4) %
GBP/USD	1.31	1.1 %	2.6 %
USD/JPY	109.50	0.1 %	(0.1) %
USD/AUD	1.43	(0.9) %	0.9 %
USD/SGD	1.35	(0.3) %	(0.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	(0.1) %	32.5 %
Gold(INR/10g)	38,806	0.0 %	23.1 %
Gold Comex(USD/oz)	1,512	0.0 %	17.1 %
SILVER(INR/1Kg)	46,049	(0.3) %	20.3 %
Aluminium(USD/MT)	1,791	0.1 %	(3.6) %
Copper(USD/MT)	6,184	(0.4) %	5.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.9	0.0 %	(0.7) %

Global Economy: Chicago-area business activity continued to contract in the month of December, according to a report released by MNI Indicators on Monday, although the pace of contraction slowed from the previous month. MNI Indicators said its Chicago business barometer climbed to 48.9 in December from 46.3, but a reading below 50 still indicates a contraction in regional business activity. The increase by the business barometer was partly due to a jump by the production, which surged up to a four-month high of 47.2. China's retail sales are expected to increase 8% in 2019 to 41.1 trillion yuan, the official Xinhua News Agency reported on Monday, media reports noted. That compared with a 9% rise in retail sales in 2018. Industrial production in South Korea declined a seasonally adjusted 0.5 percent on month in November, Statistics Korea said on Monday. That followed the 1.7% drop in October. On a yearly basis, industrial production dipped 0.3% after dropping 2.5% in the previous month. Switzerland's economic outlook is likely to brighten at the start of next year, yet remain subdued, the KOF Swiss Economic Institute said on Monday. The KOF Economic Barometer reached its previous year's closing level in December. The barometer, which tended to fall during the year 2019, has thus fully recovered. However, the barometer is still below its long-term average. The outlook for the Swiss economy at the beginning of 2020 is brightening somewhat, but remains subdued.

Global Equities: US stocks eased. European markets continued to trade lower too as investors locked profits after strong gains last week.

Indian Economy: The Reserve Bank of India has released draft circular on limits on exposure to single and group borrowers/parties, large exposures and revision in priority sector lending targets for primary (urban) co-operative banks (UCBs) for feedback/ suggestions. The circular stipulates that the prudential exposure limits for UCBs for a single borrower/party and a group of connected borrowers/parties shall be 10% and 25%, respectively, of their Tier I capital and that at least 50% of their loan portfolio shall comprise loans not more than Rs 25 lakh per borrower/party. NITI Aayog released the second edition of the Sustainable Development Goals (SDG) India Index, which comprehensively documents the progress made by India's States and Union Territories towards achieving the 2030 SDG targets. India's composite score has improved from 57 in 2018 to 60 in 2019, thereby showing noticeable progress.

Equity Markets: Key market barometers ended almost flat after a volatile trade on Monday. The barometer index, the BSE Sensex, fell 17.14 points or 0.04% to 41,558.00, as per the provisional closing data. The Nifty 50 index gained 14.80 points or 0.12% to 12,260.60, as per the provisional closing data. The broader market was bullish. The S&P BSE Mid-Cap index rose 0.29% and the BSE Small-Cap index gained 0.75%.

Corporate News: Reliance Industries and UK's BP plc paid USD 36 million to get their defaulting Canadian partner Niko Resources to exit from the eastern offshore KG-D6 block. In a statement, Niko said it has exited from the KG-DWN-98/3 block and its 10% stake has been taken over by Reliance and BP. United Spirits said CRISIL has revised its outlook on the long term bank facilities and non convertible debentures of United Spirits (USL) to 'Positive' from 'Stable' while reaffirmed the rating at 'CRISIL AA+'. The short term rating and commercial paper has been reaffirmed at 'CRISIL A1+'. The outlook revision reflects the expectation of improvement in USL's credit profile, commensurate with better cash accrual and leverage over the medium term. Piramal Enterprises said the Company approved the allotment of 16,000 secured, rated, unlisted, redeemable nonconvertible debentures each having a face value of Rs 10,00,000/-, aggregating to Rs 1,600 crore on private placement basis.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	18.5	55.2	41.6
MF(INR cr)	(1,539.7)	131.0	286.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	28,394	34,908	36,698
F&O(INR cr)	800,345	1,403,826	1,354,143

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.8	13.8	15.0
NSE VIX	11.0	12.9	16.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	32,355	(0.2) %	6.7 %	Energy	15,962	0.1 %	(3.4) %
IT	15,775	(0.0) %	(0.4) %	Pharma	8,083	0.2 %	(13.8) %
Metals	2,797	1.3 %	(9.9) %	Finance	14,651	(0.2) %	17.2 %
Auto	8,325	1.5 %	(1.1) %	PSU	2,537	(1.2) %	(25.0) %
FMCG	30,225	0.3 %	0.1 %	Real Estate	296	0.1 %	10.9 %

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>
Vodafone I	6	6.0 %	(65.4) %	New India	135	(2.8) %	(28.5) %
Tata Motor	77	5.6 %	(16.9) %	Avenue Sup	1,884	(2.2) %	26.2 %
Tata Motor	184	4.3 %	(1.9) %	ICICI Lomb	1,387	(1.7) %	36.6 %
Ashok Leyl	82	2.6 %	(9.5) %	General In	225	(1.6) %	(8.6) %
Eicher Mot	22,785	2.5 %	13.6 %	Punjab Nat	64	(1.5) %	(33.9) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Manufacturing PMI (DEC)	31-12-2019	6:30	CNY	-	50.2
House Price Index (MoM) (OCT)	31-12-2019	19:30	USD	-	0.006
Consumer Confidence Index (DEC)	31-12-2019	20:30	USD	-	125.5

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