



### Indices Performance

Global Indices	29-Dec	Prev_Day	Abs. Change	% Change
Russell 3000	1,948	1,955	-7	-0.37
Nasdaq	12,850	12,899	-49	-0.38
FTSE	6,603	6,502	101	1.55
Nikkei	27,568	26,854	714	2.66
Hang Seng	26,568	26,315	254	0.96
Indian Indices	29-Dec	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	47,613	47,354	259	0.55
Nifty 50	13,933	13,873	59	0.43
Nifty 100	14,038	13,987	51	0.36
Nifty 500	11,467	11,435	32	0.28
Nifty Bank	31,323	30,881	442	1.43
S&P BSE Power	2,053	2,070	-17	-0.81
S&P BSE Small Cap	17,968	17,939	29	0.16
S&P BSE HC	21,583	21,648	-65	-0.30

### P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
29-Dec	33.34	0.83	38.31	1.14
Month Ago	31.49	0.92	35.66	1.22
Year Ago	26.13	1.02	28.48	1.23

### Nifty 50 Top 3 Gainers

Company	29-Dec	Prev_Day	% Change
IndusInd Bank	913	867	5.30
Axis Bank	630	618	2.03
Tech Mahindra	966	947	1.96

### Nifty 50 Top 3 Losers

Company	29-Dec	Prev_Day	% Change
Coal India	135	138	-1.85
NTPC	99	100	-1.84
Nestle India Limited	18263	18597	-1.80

### Advance Decline Ratio

	BSE	NSE
Advances	1535	944
Declines	1488	1008
Unchanged	165	92

### Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	1702	166086
MF Flows**	-1156	-46995

\*29<sup>th</sup> Dec 2020; \*\*17<sup>th</sup> Dec 2020

### Economic Indicator

YoY(%)	Current	Quarter Ago	Year Ago
CPI	6.93% (Nov-20)	6.69% (Aug-20)	5.54% (Nov-19)
IIP	3.60% (Oct-20)	-10.50% (Jul-20)	-6.60% (Oct-19)
GDP	-7.50% (Sep-20)	-23.90% (Jun-20)	4.40% (Sep-19)

Since May-17, MOSPI has revised base year of IIP & WPI from 2004-05 to 2011-12, and for CPI from 2010 to 2012

[1] Data as on 28 Dec, 2020

### Global Indices

- Asian markets closed in the green as investors continued to take positive cues from news about U.S. President signing a \$2.3 trillion government spending bill and a post-Brexit trade agreement between the European Union and the U.K. Today (as on Dec 30), Asian markets opened lower following losses on the Wall Street overnight. Both Nikkei and Hang Seng fell 0.64% and 0.53%, respectively (as at 8 a.m. IST).
- European markets rose on positive developments over U.S. stimulus and post-Brexit trade deal. The signing of a massive \$2.3 trillion fiscal relief package signed by the U.S. President, and the agreement between the European Union and Britain over a post-Brexit trade deal continued to keep investor sentiment upbeat.
- U.S. markets fell as market participants looked to book profits on the recent strength in the markets, leading to the pullback by the major averages.

### Indian Equity Market

- Indian equity markets extended the rally as gush of liquidity by foreign investors lifted the benchmark indices to new highs. Upbeat global cues also improved buying interest as post-Brexit trade deal between European Union and the U.K raised investor expectations over rapid economic recovery.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 0.55% and 0.43% to close at 47,613.08 and 13,932.60 respectively.
- The overall market breadth on BSE was strong with 1,535 scrips advancing and 1,488 scrips declining. A total of 165 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Bankex was the major gainer, up 1.41% followed by S&P BSE Finance, up 1.06% and S&P BSE IT, up 0.65%. S&P BSE Metal was the major loser, down 1.32% followed by S&P BSE Power, down 0.81% and S&P BSE Energy, down 0.67%.

### Domestic News

- According to the Reserve Bank of India, the gross non-performing assets (GNPA) ratio of scheduled commercial banks (SCBs) declined from 9.1% at the end of Mar 2019 to 8.2% at the end of Mar 2020 and further to 7.5% at the end of Sep 2020. The Capital to risk weighted assets (CRAR) ratio of SCBs also improved from 14.3% at the end of Mar 2019 to 14.7% at the end of Mar 2020 and further to 15.8% at the end of Sep 2020. RBI further noted that the performance of state co-operative banks improved, both in terms of profitability and asset quality.
- Data from the Ministry of Coal showed that the total revenue generated from the auctioned and allotted mines is Rs. 8,964.75 crores till Nov 2020. The ministry further added that till date, 11 coal blocks under the Mines and Minerals (Development and Regulation) (MMDR Act) have been allotted to various Government companies, where 2 blocks are for commercial purpose and remaining 9 are for captive end use.
- Data from the Ministry of Agriculture & Farmers Welfare showed that paddy procurement as on Dec 28, 2020 grew 24.90% compared to the same period of the previous. Also, about 57.47 lakh farmers benefitted from the ongoing Kharif Marketing Season (KMS) procurement Operations with MSP (Minimum Support Price) value of Rs 87391.98 Crore.
- Larsen & Toubro (L&T) said a 'significant' contract has been won in Chhattisgarh. The exact contract value was not given by the organization. However, a significant contract varies from Rs. 1,000 crore to Rs. 2,500 crore as per its classification.
- ICICI Bank said it will acquire a 9.09% stake in the Myclassboard Educational Solutions Pvt Ltd educational technology platform for Rs 4.5 crore in cash consideration.

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FII Derivative Trade Statistics		29-Dec		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	4235.55	3803.09	17380.75	
Index Options	155724.66	152912.62	89022.25	
Stock Futures	32209.28	33233.93	102236.89	
Stock Options	6309.14	6155.42	8477.76	
<b>Total</b>	<b>198478.63</b>	<b>196105.06</b>	<b>217117.65</b>	

Derivative Statistics- Nifty Options			
	29-Dec	Prev_Day	Change
Put Call Ratio (OI)	1.55	1.69	-0.14
Put Call Ratio(Vol)	1.17	1.08	0.09

Debt Watch				
	29-Dec	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.15%	3.26%	3.13%	5.11%
T-Repo	3.00%	3.25%	2.88%	4.50%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	3.02%	3.11%	2.89%	4.90%
364 Day T-Bill	3.43%	3.42%	3.33%	5.26%
10 Year Gilt	5.93%	5.95%	5.89%	6.51%
G-Sec Vol. (Rs.Cr)	13840	21840	45782	42216
FBIL MIBOR <sup>[1]</sup>	3.45%	3.44%	3.40%	5.25%
3 Month CP Rate	3.30%	3.35%	3.15%	5.40%
5 Year Corp Bond	6.34%	6.30%	6.39%	7.77%
1 Month CD Rate	3.08%	3.14%	2.98%	4.95%
3 Month CD Rate	3.08%	3.11%	3.22%	5.10%
1 Year CD Rate	3.77%	3.75%	3.57%	6.05%

Currency Market			
Currency	29-Dec	Prev_Day	Change
USD/INR	73.37	73.59	-0.22
GBP/INR	98.92	99.84	-0.93
EURO/INR	89.79	89.95	-0.16
JPY/INR	0.71	0.71	0.00

Commodity Prices				
Commodity	29-Dec	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	47.82	46.97	45.55	61.73
Brent Crude(\$/bl)	50.55	50.64	46.06	70.65
Gold( \$/oz)	1878	1860	1788	1510
Gold(Rs./10 gm)	49854	49979	48778	38791

Source: Refinitiv

[1] Data as on 28 Dec, 2020

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### Derivatives Market

- Nifty Dec 2020 Futures stood at 13,935.05, a premium of 2.45 points above the spot closing of 13,932.60. The turnover on NSE's Futures and Options segment rose to Rs. 23,91,918.26 crore on December 29, 2020, compared with Rs. 16,39,885.01 crore on December 28, 2020.
- The Put-Call ratio stood at 0.97 compared with the previous session's close of 0.95.
- The Nifty Put-Call ratio stood at 1.55 compared with the previous session's close of 1.69.
- Open interest on Nifty Futures stood at 14.41 million, compared with the previous session's close of 14.27 million.

### Indian Debt Market

- Bond yields almost steady ahead of the special open market operation (OMO) (simultaneous purchase and sale of government securities) by the Reserve Bank of India (RBI) on Wednesday.
- Yield on the 10-year benchmark paper (5.77% GS 2030) remained unchanged at 5.93% from the previous close of after trading in the range of 5.92% to 5.93%.
- Banks borrowed Rs. 7 crore under the central bank's marginal standing facility on Dec 28, compared to Rs. 50 crore borrowing on Dec 24.

### Currency Market Update

- The Indian rupee rose and reached more than two month high against the U.S. dollar, following broad weakness in the greenback.
- Euro rose against the U.S. dollar after U.S. lawmakers cleared the decks for an enhanced Covid-19 relief package. The House of Representatives voted on Monday to enhance payments to Americans, to \$2,000 from \$600. Now the plan will be voted by the Senate.

### Commodity Market Update

- Gold prices rose following approval of the COVID-19 relief package in U.S.
- Brent crude prices rose on hopes that the U.S. government may expand its COVID-19 relief package which improved the demand outlook of the commodity.

### International News

- According to the Bank of Korea, South Korea's composite consumer sentiment index (CCSI) fell to 89.8 in Oct 2020 from 97.9 in Nov 2020.
- According to data from the Department of Statistics, Singapore's producer prices index fell 8.8% YoY in Nov 2020 following 8.3% decline in Oct 2020.
- According to survey results from IHS Markit, Austria's manufacturing Purchasing Managers' Index (PMI) rose to 53.5 in Dec 2020 from 51.7 in Nov 2020. Austria's manufacturing sector continued to recover from the Covid-19 pandemic.

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Mutual Fund Investments are subject to market risks, read all scheme related documents carefully.