



### Indices Performance

Global Indices	30-Dec	Prev_Day	Abs. Change	% Change
Russell 3000	1,948	1,948	0	0.02
Nasdaq	12,870	12,850	20	0.15
FTSE	6,556	6,603	-47	-0.71
Nikkei	27,444	27,568	-124	-0.45
Hang Seng	27,147	26,568	579	2.18
Indian Indices	30-Dec	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	47,746	47,613	133	0.28
Nifty 50	13,982	13,933	49	0.35
Nifty 100	14,088	14,038	51	0.36
Nifty 500	11,510	11,467	43	0.37
Nifty Bank	31,303	31,323	-19	-0.06
S&P BSE Power	2,062	2,053	8	0.41
S&P BSE Small Cap	18,033	17,968	66	0.37
S&P BSE HC	21,581	21,583	-2	-0.01

### P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
30-Dec	33.41	0.83	38.45	1.14
Month Ago	31.49	0.92	35.66	1.22
Year Ago	26.19	1.02	28.50	1.23

### Nifty 50 Top 3 Gainers

Company	30-Dec	Prev_Day	% Change
Ultratech Cem	5355	5147	4.04
Shree Cements Limited	24600	23840	3.19
Grasim Indus	934	910	2.74

### Nifty 50 Top 3 Losers

Company	30-Dec	Prev_Day	% Change
IndusInd Bank	899	913	-1.52
Sun Pharma	584	591	-1.12
Axis Bank	625	630	-0.81

### Advance Decline Ratio

	BSE	NSE
Advances	1650	1020
Declines	1313	889
Unchanged	171	104

### Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	2411	168498
MF Flows**	-1156	-46995

\*30<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 29 Dec, 2020

### Global Indices

- Asian markets witnessed a mixed trend as positive vibes generated from mass COVID-19 vaccination drives in several countries and the passage of U.S. fiscal stimulus were neutralised by official data showing China's GDP for 2019 was revised downward. Today (as on Dec 31), Asian markets opened lower as multiple markets are set to close early for New Year's Eve. Both Nikkei and Hang Seng fell 0.45% and 0.35%, respectively (as at 8 a.m. IST).
- European markets fell as market participants did profit booking after recent strong gains. Slightly waning euphoria over the passage of a massive Covid-19 relief package in the U.S., and worries about whether the U.S. Senate would approve a proposal to increase the size of the stimulus payments rendered the markets sluggish.
- U.S. markets rose initially but pared off gains to some extent on profit taking. News that U.K. regulators have approved a covid-19 vaccine developed by AstraZeneca and the University of Oxford for emergency use generated some positive sentiment.

### Indian Equity Market

- Indian equity markets advanced with Nifty 50 nearing 14000-mark, led by positive global cues. Optimism over additional U.S. fiscal aid and massive vaccination efforts spurred hopes of a strong global economic recovery in 2021. Meanwhile, Britain approved a COVID-19 vaccine developed by AstraZeneca and Oxford University for emergency supply in the U.K.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 0.28% and 0.35% to close at 47,746.22 and 13,981.95 respectively.
- The overall market breadth on BSE was strong with 1,650 scrips advancing and 1,313 scrips declining. A total of 171 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Basic Materials was the major gainer, up 1.61% followed by S&P BSE Auto, up 1.37% and S&P BSE Realty, up 1.31%. S&P BSE Telecom was the major loser, down 0.68% followed by S&P BSE Tech, down 0.22% and S&P BSE IT, down 0.15%.

### Domestic News

- The Union Cabinet approved the export of Akash Missile System. In addition, the Union Cabinet also created a committee for faster Approval of Exports. The committee would authorise subsequent exports of major indigenous platforms to various countries.
- The Union Cabinet gave its approval for construction of various trunk infrastructure components. The total estimated costs of the approved proposals are Rs. 7,725 crore. The move will give a fillip to manufacturing investments into the country and provide quality, reliable, sustainable and resilient infrastructure to industries.
- The Union Cabinet has approved the project 'Deepening and Optimization of Inner Harbour Facilities including Development of Western Dock on Build, Operate and Transfer (BOT) basis under Public-Private Partnership (PPP) mode to handle cape size vessels at Paradip Port'. The estimated cost of the project is Rs.3,004.63 Crore. The project is expected to boost the industrial economy by reducing sea freight and making coal imports cheaper.
- The Union Cabinet gave its approval for modified scheme to improve ethanol distillation capacity in the country. The move is expected to increase income of farmers as other feed stocks which will help improve their livelihoods.
- Reliance Industries Ltd has completed the acquisition of IMG Worldwide LLC's stake in its joint venture in sports management, IMG Reliance Ltd.
- Kalpataru Power Transmission Ltd said it has secured new orders worth Rs. 900 crore in the domestic and overseas markets. The company said that it has won orders from the overseas market in the T&D (transmission and distribution) industry.

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FII Derivative Trade Statistics		30-Dec		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	4954.21	5241.11	17493.08	
Index Options	247962.12	247968.97	100390.34	
Stock Futures	39369.02	40388.48	101678.22	
Stock Options	6201.16	6560.47	8305.13	
<b>Total</b>	<b>298486.51</b>	<b>300159.03</b>	<b>227866.77</b>	

Derivative Statistics- Nifty Options			
	30-Dec	Prev_Day	Change
Put Call Ratio (OI)	1.56	1.55	0.01
Put Call Ratio(Vol)	1.06	1.17	-0.11

Debt Watch				
	30-Dec	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.25%	3.26%	3.13%	5.09%
T-Repo	2.99%	3.23%	2.88%	4.61%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	3.06%	3.10%	2.89%	4.99%
364 Day T-Bill	3.44%	3.45%	3.33%	5.18%
10 Year Gilt	5.90%	5.95%	5.89%	6.55%
G-Sec Vol. (Rs.Cr)	18333	14131	45782	21758
FBIL MIBOR <sup>[1]</sup>	3.45%	3.44%	3.40%	5.25%
3 Month CP Rate	3.28%	3.30%	3.15%	5.42%
5 Year Corp Bond	6.32%	6.32%	6.39%	7.71%
1 Month CD Rate	3.05%	3.21%	2.98%	4.96%
3 Month CD Rate	3.07%	3.10%	3.22%	5.05%
1 Year CD Rate	3.78%	3.79%	3.57%	6.05%

Currency Market			
Currency	30-Dec	Prev_Day	Change
USD/INR	73.28	73.37	-0.08
GBP/INR	99.18	98.92	0.27
EURO/INR	89.99	89.79	0.19
JPY/INR	0.71	0.71	0.00

Commodity Prices				
Commodity	30-Dec	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	48.21	47.89	45.15	61.63
Brent Crude(\$/bl)	50.36	51.70	45.78	69.49
Gold( \$/oz)	1893	1872	1777	1515
Gold(Rs./10 gm)	49774	49706	48778	38806

Source: Refinitiv

[1] Data as on 29 Dec, 2020

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### Derivatives Market

- Nifty Dec 2020 Futures stood at 13,977.45, a discount of 4.50 points below the spot closing of 13,981.95. The turnover on NSE's Futures and Options segment rose to Rs. 30,84,291.70 crore on December 30, 2020, compared with Rs. 23,91,918.26 crore on December 29, 2020.
- The Put-Call ratio stood at 0.99 compared with the previous session's close of 0.97.
- The Nifty Put-Call ratio stood at 1.56 compared with the previous session's close of 1.55.
- Open interest on Nifty Futures stood at 16.21 million, compared with the previous session's close of 14.41 million.

### Indian Debt Market

- Bond yields decline on expectations of additional open market operations (OMO) by the Reserve Bank of India (RBI).
- Yield on the 10-year benchmark paper (5.77% GS 2030) fell 3 bps to close at 5.90% from the previous close of 5.93% after trading in the range of 5.90% to 5.93%.
- Banks borrowed Rs. 244 crore under the central bank's marginal standing facility on Dec 29, compared to Rs. 7 crore borrowing on Dec 28.

### Currency Market Update

- The Indian rupee rose for the fifth consecutive session and touched its highest level in 11 weeks against the U.S. dollar following broad greenback weakness and rise in Asian currencies. Greenback selling from exporters also aided move in rupee.
- Euro rose for the sixth consecutive session and touched 2 year highs against the U.S. dollar as market participants anticipate on more U.S. fiscal support.

### Commodity Market Update

- Gold prices rose as the prospect of increased fiscal aid kept the U.S. dollar under pressure.
- Brent crude prices fell on worries about whether the U.S. Senate would approve a proposal to increase the size of the stimulus payments

### International News

- According to data published by the Nationwide Building Society, U.K. house prices rose 7.3% YoY in Dec 2020 following 6.5% increase in Nov 2020. On a monthly basis, house price inflation eased 0.8% in Dec 2020 from 0.9% in the previous month.
- The National Bureau of Statistics revised down China's GDP growth for 2019 to 6.0% from 6.1%. For 2019, the government had targeted 6.0% - 6.5% annual expansion. China resisted setting economic growth goals for the first time this year because of the uncertainty created by the Covid-19 outbreak.
- According to Statistics Korea, South Korea's industrial production rose 0.5% YoY in Nov 2020 after declining 2.2% in Oct 2020.

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