

### Indices Performance

Global Indices	08-Feb	Prev_Day	Abs. Change	% Change
Russell 3000	2,061	2,048	13	0.66
Nasdaq	13,988	13,856	131	0.95
FTSE	6,524	6,489	34	0.53
Nikkei	29,389	28,779	609	2.12
Hang Seng	29,319	29,289	31	0.11
Indian Indices	08-Feb	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	51,349	50,732	617	1.22
Nifty 50	15,116	14,924	192	1.28
Nifty 100	15,178	14,989	189	1.26
Nifty 500	12,441	12,280	161	1.31
Nifty Bank	35,984	35,655	329	0.92
S&P BSE Power	2,259	2,230	29	1.29
S&P BSE Small Cap	19,389	19,096	293	1.53
S&P BSE HC	21,892	21,806	86	0.39

### P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
8-Feb	35.61	0.80	42.00	1.05
Month Ago	33.93	0.82	39.45	1.11
Year Ago	24.49	1.03	27.03	1.26

### Nifty 50 Top 3 Gainers

Company	08-Feb	Prev_Day	% Change
M&M	928	866	7.27
Hindalco	279	262	6.45
Tata Motors	336	316	6.35

### Nifty 50 Top 3 Losers

Company	08-Feb	Prev_Day	% Change
Britannia Industries Limited	3474	3542	-1.92
HUL	2237	2270	-1.45
Kotak Bank	1957	1983	-1.29

### Advance Decline Ratio

	BSE	NSE
Advances	1689	1174
Declines	1345	793
Unchanged	193	96

### Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	1412	31677
MF Flows**	-941	-17592

\*8<sup>th</sup> Feb 2021; \*\*4<sup>th</sup> Feb 2021

### Economic Indicator

YoY(%)	Current	Quarter Ago	Year Ago
CPI	4.59% (Dec-20)	7.27% (Sep-20)	7.35% (Dec-19)
IIP	-1.90% (Nov-20)	-7.10% (Aug-20)	2.10% (Nov-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 05 Feb, 2021

### Global Indices

- Asian markets closed in the green with investors focusing on the U.S. stimulus update after Senate and House approved a budget outline that will allow the \$1.9 trillion COVID-19 relief package get through Democratic-held Senate with a simple majority. Today (as on Feb 09), Asian markets rose following gains on the Wall Street Overnight. Both Nikkei and Hang Seng rose 0.44% and 0.42%, respectively (as at 8 a.m. IST).
- European markets rose on rising expectations about global economic recovery gathering momentum on faster rollout of vaccines and optimism about U.S. economic stimulus.
- U.S. markets rose as slowdown in the spread of the coronavirus in various parts of the world and vaccine rollout efforts have helped generate continued buying interest.

### Indian Equity Market

- Indian equity markets extended the rally, backed by optimism that falling coronavirus infection rates and the continued rollout of vaccines will provide a major boost to the economic recovery.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 1.22% and 1.28% to close at 51,348.77 and 15,115.80 respectively.
- The overall market breadth on BSE was strong with 1,689 scrips advancing and 1,345 scrips declining. A total of 193 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Auto was the major gainer, up 3.07% followed by S&P BSE Metal, up 3% and S&P BSE Industrials, up 2.56%. S&P BSE FMCG was the only loser, down 0.53%.

### Domestic News

- Data from the Ministry of Steel showed that the production and consumption of total finished steel (Non-alloy, alloy/stainless) in India stood at 9.32 MT and 9.68 MT respectively in Dec 2020. Production and consumption of total finished steel thus witnessed a growth of 1.08% and 11.91% respectively in the same month. The ministry is of the view that the Atmanirbhar Bharat and the Production Linked Incentive (PLI) Scheme will help attract capital investments and enhance demand and production of steel in the country.
- RBI after reviewing current liquidity and financial conditions has decided to purchase government securities under Open Market Operations (OMO) for an aggregate amount of Rs. 20,000 crore on Feb 10, 2021.
- According to a major global credit rating agency, the guidelines mandated by the Reserve Bank of India (RBI) for implementing a risk-based internal audit framework in non-banking finance companies (NBFCs) is credit positive. This is because the move will improve the resilience of the companies to unexpected shocks as it will add another layer of risk monitoring.
- According to media reports, the Chemical and Fertiliser Minister while attending an event opined that the domestic pharmaceutical industry may reach \$130 billion by 2030.
- According to media reports, state-owned Oil and Natural Gas Corporation (ONGC) will implement India's maiden geothermal field development project in Ladakh. This will use the heat generated by the Earth's core for production of clean energy.
- According to media reports, the United States Food and Drug Administration has made five observations after inspection at the facility of Alembic Pharmaceuticals at Karkhadi, Gujarat.

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FII Derivative Trade Statistics		08-Feb		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	5932.82	6393.52	12983.88	
Index Options	344473.45	342069.18	87514.52	
Stock Futures	17056.99	17092.13	101831.49	
Stock Options	15150.34	15111.23	12746.33	
Total	382613.60	380666.06	215076.22	

Derivative Statistics- Nifty Options			
	08-Feb	Prev_Day	Change
Put Call Ratio (OI)	1.52	1.41	0.11
Put Call Ratio(Vol)	1.13	0.95	0.18

Debt Watch				
	08-Feb	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.23%	3.21%	3.18%	5.03%
T-Repo	3.21%	3.20%	3.22%	4.92%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	3.35%	3.33%	3.04%	5.10%
364 Day T-Bill	3.42%	3.70%	3.31%	5.25%
10 Year Gilt	6.09%	6.07%	5.89%	6.44%
G-Sec Vol. (Rs.Cr)	28168	47031	33856	76366
FBIL MIBOR <sup>[1]</sup>	3.47%	3.47%	3.45%	5.20%
3 Month CP Rate	3.80%	3.90%	3.45%	5.80%
5 Year Corp Bond	6.64%	6.58%	6.35%	6.97%
1 Month CD Rate	3.33%	3.35%	3.16%	5.16%
3 Month CD Rate	3.34%	3.34%	3.03%	5.62%
1 Year CD Rate	4.03%	4.04%	3.79%	6.10%

Currency Market			
Currency	08-Feb	Prev_Day	Change
USD/INR	72.86	72.90	-0.04
GBP/INR	100.04	99.73	0.32
EURO/INR	87.72	87.20	0.52
JPY/INR	0.69	0.69	0.00

Commodity Prices				
Commodity	08-Feb	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	57.92	53.52	52.11	50.29
Brent Crude(\$/bl)	59.87	56.16	55.26	55.12
Gold( \$/oz)	1830	1860	1848	1570
Gold(Rs./10 gm)	47457	48724	50256	40556

Source: Refinitiv

[1] Data as on 05 Feb, 2021

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### Derivatives Market

- Nifty Feb 2021 Futures stood at 15,126.50, a premium of 10.70 points above the spot closing of 15,115.80. The turnover on NSE's Futures and Options segment fell to Rs. 24,96,736.95 crore on February 08, 2021, compared with Rs. 25,08,349.99 crore on February 05, 2021.
- The Put-Call ratio stood at 1.03 compared with the previous session's close of 0.92.
- The Nifty Put-Call ratio stood at 1.52 compared with the previous session's close of 1.41.
- Open interest on Nifty Futures stood at 12.25 million, compared with the previous session's close of 12.27 million.

### Indian Debt Market

- Bond yields fell as the Reserve Bank of India (RBI) announced to buy government securities on Wednesday.
- Yield on the 10-year benchmark paper (5.85% GS 2030) fell 3 bps to close at 6.04% from the previous close of 6.07% after trading in the wide range of 6.01% to 6.07%.
- National Bank for Agriculture and Rural Development (NABARD) plans to raise funds selling commercial papers maturing in six months at a coupon of 3.91% and has received commitments worth around Rs. 1400 crore.
- Banks borrowed Rs. 6 crore under the central bank's marginal standing facility on Feb 5, 2021 compared to that of Feb 04, 2021 when banks borrowed Rs. 5 crore.

### Currency Market Update

- The Indian rupee eased against the U.S. dollar, as likely intervention by the Reserve Bank of India (RBI) through greenback buying by state-run banks' outweighed the impact of positive regional cues.
- Euro was almost unchanged against the U.S. dollar after rising sharply on downbeat U.S. nonfarm payroll data released on Friday.

### Commodity Market Update

- Gold prices rose on growing prospects of a substantial U.S. stimulus package which kept the greenback under pressure.
- Brent crude prices rose on the back of supply curbs by other members of the OPEC and its allies.

### International News

- Data from Destatis showed that industrial production in Germany stalled in Dec 2020 as the country faced restrictions due to the second wave of the coronavirus pandemic. On a yearly basis, the decline in industrial output eased to 1% from 2.5% a month ago.
- Survey data from Sentix showed that the Eurozone investor confidence fell in Feb 2020 which can be attributed to the slower pace of vaccination. The investor sentiment index fell unexpectedly to -0.2 in Feb 2021 from +1.3 in the previous month.
- Fitch Ratings maintained the sovereign ratings of Japan with a 'negative' outlook. The outlook remained negative due to risks to the macroeconomic and fiscal outlook from the COVID-19 pandemic.

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