



### Indices Performance

Global Indices	10-Feb	Prev_Day	Abs. Change	% Change
Russell 3000	2,057	2,061	-4	-0.21
Nasdaq	13,973	14,008	-35	-0.25
FTSE	6,524	6,532	-7	-0.11
Nikkei	29,563	29,506	57	0.19
Hang Seng	30,039	29,476	563	1.91
Indian Indices	10-Feb	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	51,309	51,329	-20	-0.04
Nifty 50	15,107	15,109	-3	-0.02
Nifty 100	15,176	15,171	5	0.03
Nifty 500	12,452	12,434	18	0.15
Nifty Bank	35,783	36,057	-273	-0.76
S&P BSE Power	2,246	2,249	-3	-0.14
S&P BSE Small Cap	19,420	19,339	81	0.42
S&P BSE HC	21,856	21,771	85	0.39

### P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
10-Feb	35.67	0.80	41.81	1.05
Month Ago	33.93	0.82	39.45	1.11
Year Ago	24.79	1.04	26.89	1.27

### Nifty 50 Top 3 Gainers

Company	10-Feb	Prev_Day	% Change
Bajaj Finserv Limited	10228	9942	2.88
Cipla	863	842	2.57
SBI Life Insurance Company Limited	911	889	2.55

### Nifty 50 Top 3 Losers

Company	10-Feb	Prev_Day	% Change
HDFC Bank	1582	1612	-1.87
NA	2901	2948	-1.57
Bharti Airtel	590	599	-1.46

### Advance Decline Ratio

	BSE	NSE
Advances	1406	879
Declines	1558	1048
Unchanged	161	89

### Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	3307	37157
MF Flows**	-1118	-18710

\*10<sup>th</sup> Feb 2021; \*\*5<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 09 Feb, 2021

### Global Indices

- Asian markets closed in the green as optimism over additional U.S. COVID-19 relief package and falling coronavirus infections rates helped to underpin investor sentiment. Today (as on Feb 11), Asian markets were muted as multiple markets were closed on holidays. While Nikkei was closed, Hang Seng fell 0.50% (as at 8 a.m. IST).
- European markets fell with market participants staying largely cautious and booking profits after recent strong gains. Investors were also following updates on coronavirus cases, the latest batch of economic data from the continent and news about U.S. stimulus plan.
- U.S. markets closed on a mixed note as buying interest faded as market participants were uncertain about the near-term outlook for the markets.

### Indian Equity Market

- Indian equity markets dipped as investors were seen booking profits at record highs. However, late buying in the last hour of the trading session helped indices close on a flat note.
- Key benchmark indices S&P BSE Sensex and Nifty 50 lost 0.04% and 0.02% to close at 51,309.39 and 15,106.50 respectively.
- The overall market breadth on BSE was weak with 1,406 scrips advancing and 1,558 scrips declining. A total of 161 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Realty was the major gainer, up 1.72% followed by S&P BSE Consumer Durables, up 1.27% and S&P BSE Consumer Discretionary Goods & Services, up 0.99%. S&P BSE Telecom was the major loser, down 1.46% followed by S&P BSE Bankex, down 0.65% and S&P BSE Capital Goods, down 0.49%.

### Domestic News

- The Parliament passed the Major Port Authorities Bill, 2020. The bill focuses on reorienting the governance model in central ports in line with the successful global practices.
- The government gave its approval for inclusion of Specialty Steel under the Production Linked Incentive (PLI) Scheme with a 5-year financial outlay of Rs. 6,322 crore. The objective of the move is to give a fillip to the manufacturing of 'Specialty Steel' within the country by generating employment, attracting capital investment and promoting technology up-gradation in the steel sector.
- According to media reports, capital market regulator Securities and Exchange Board of India (SEBI), is considering introducing a framework by which it will be able to ascertain the incidents of technical glitches and compensate the investors accordingly. SEBI also wants to devise a methodology for calculation of such compensation. Furthermore, SEBI will review the existing framework for improving the efficiency and effectiveness of liquidity enhancement measures such as market making, Liquidity Enhancement Scheme (LES) and call auction mechanism for illiquid securities.
- Data from the Ministry of Commerce showed that India's exports of cereals - rice, wheat and coarse cereals rose to Rs. 49,832 crore during the period from Apr to Dec of 2020 from Rs. 32,591 crore in the same period of the previous year. India's export of cereals thus witnessed a growth of 52.90% over the year. The increase in exports can be attributed to measures taken by the government for ensuring uninterrupted exports of rice while taking all COVID-19 safety precautions.
- According to media reports, the consolidated net profit of Titan rose 11.8% to Rs. 530 crore from Rs. 474 crore in the same period of the previous year.
- According to media reports, the consolidated net profit of Hindalco Industries rose 76.74% to Rs. 1,877 crore from Rs. 1,062 crore in the same period of the previous year.

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FII Derivative Trade Statistics		10-Feb		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	3971.10	3600.36	12483.77	
Index Options	391956.27	392448.25	102688.51	
Stock Futures	13204.56	13166.22	103262.83	
Stock Options	14402.33	14555.41	15102.71	
Total	423534.26	423770.24	233537.82	

Derivative Statistics- Nifty Options			
	10-Feb	Prev_Day	Change
Put Call Ratio (OI)	1.30	1.38	-0.09
Put Call Ratio (Vol)	0.95	1.05	-0.10

Debt Watch				
	10-Feb	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.25%	3.20%	3.18%	5.02%
T-Repo	3.22%	3.19%	3.22%	4.91%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	3.31%	3.36%	3.04%	5.04%
364 Day T-Bill	3.70%	3.73%	3.31%	5.24%
10 Year Gilt	6.04%	6.10%	5.89%	6.44%
G-Sec Vol. (Rs.Cr)	29063	21666	33856	49342
FBIL MIBOR <sup>[1]</sup>	3.46%	3.48%	3.45%	5.21%
3 Month CP Rate	3.75%	3.85%	3.45%	5.80%
5 Year Corp Bond	6.63%	6.57%	6.35%	7.00%
1 Month CD Rate	3.33%	3.38%	3.16%	5.14%
3 Month CD Rate	3.41%	3.37%	3.03%	5.41%
1 Year CD Rate	4.07%	4.05%	3.79%	6.10%

Currency Market			
Currency	10-Feb	Prev_Day	Change
USD/INR	72.85	72.89	-0.04
GBP/INR	100.68	100.44	0.24
EURO/INR	88.33	88.03	0.29
JPY/INR	0.70	0.70	0.00

Commodity Prices				
Commodity	10-Feb	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	58.66	55.64	52.11	49.54
Brent Crude(\$/bl)	61.23	59.15	55.26	53.98
Gold(\$/oz)	1842	1834	1848	1572
Gold(Rs./10 gm)	47778	47768	50256	40589

Source: Refinitiv

[1] Data as on 09 Feb, 2021

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### Derivatives Market

- Nifty Feb 2021 Futures stood at 15,119.55, a premium of 13.05 points above the spot closing of 15,106.50. The turnover on NSE's Futures and Options segment rose to Rs. 46,51,298.26 crore on February 10, 2021, compared with Rs. 34,13,813.85 crore on February 09, 2021.
- The Put-Call ratio stood at 0.94 compared with the previous session's close of 0.91.
- The Nifty Put-Call ratio stood at 1.3 compared with the previous session's close of 1.38.
- Open interest on Nifty Futures stood at 12.18 million, compared with the previous session's close of 12.23 million.

### Indian Debt Market

- Bond yields fell after Reserve Bank of India (RBI) bought securities of Rs. 20,000 crore under open market operations (OMO) at lower-than-expected rates.
- Yield on the 10-year benchmark paper (5.85% GS 2030) fell 6 bps to close at 6.01% from the previous close of 6.07% after trading in the wide range of 6.01% to 6.07%.
- RBI conducted the auction of OMO by purchasing four government securities-6.18% GS 2024, 7.17% GS 2028, 5.77% GS 2030 and 6.19% GS 2034 for an aggregate amount of Rs. 20,000 crore. 7.17% GS 2028 did not saw any acceptance while 5.77% GS 2030 saw Rs. 14,654 crore of acceptance.
- Banks borrowed Rs. 38 crore under the central bank's marginal standing facility on Feb 9, 2021 compared to that of Feb 08, 2021 when banks borrowed nil.

### Currency Market Update

- The Indian rupee gained for the second day against the greenback following rise in Asian counterparts emanated from a fall in the U.S. dollar index to two-week lows.
- Euro rose for the fourth consecutive session against the U.S. as demand for riskier haven assets improved.

### Commodity Market Update

- Gold prices rose as hopes of a U.S. stimulus package kept the greenback under pressure.
- Brent crude prices rose after data from the American Petroleum Institute showed that crude inventories fell by 3.5 million barrels for the week ended Feb 5, 2021.

### International News

- Final data from Destatis showed that consumer price index based inflation (CPI) for Germany rose 1% on a yearly basis in Jan 2021 following a decline of 0.3% in Dec 2020. On a monthly basis, CPI climbed 0.8% in Jan 2021 following an increase of 0.5% in Dec 2020.
- Data from the National Bureau of Statistics showed that consumer price index based inflation (CPI) for China fell 0.3% on a yearly basis in Jan 2021 following an increase of 0.2% in Dec 2020. On a monthly basis, CPI rose 1% in Jan 2021 following a rise of 0.7% in Dec 2020.
- Data from Bank of Japan showed that producer prices in Japan rose 0.4% on a monthly basis in Jan 2021 following an increase of 0.5% in Dec 2020. On a yearly basis, producer prices fell 1.6% after falling 2% in the previous month.

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