



Indices Performance

Global Indices	11-Feb	Prev_Day	Abs. Change	% Change
Russell 3000	2,065	2,057	8	0.38
Nasdaq	14,026	13,973	53	0.38
FTSE	6,529	6,524	4	0.07
Nikkei ^[1]	29,563	29,506	57	0.19
Hang Seng	30,174	30,039	135	0.45
Indian Indices	11-Feb	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	51,532	51,309	222	0.43
Nifty 50	15,173	15,107	67	0.44
Nifty 100	15,250	15,176	73	0.48
Nifty 500	12,514	12,452	62	0.50
Nifty Bank	35,752	35,783	-31	-0.09
S&P BSE Power	2,246	2,246	0	-0.01
S&P BSE Small Cap	19,626	19,420	206	1.06
S&P BSE HC	21,903	21,856	47	0.22

P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
11-Feb	35.80	0.79	41.65	1.05
Month Ago	34.32	0.81	39.72	1.10
Year Ago	25.08	1.03	27.21	1.26

Nifty 50 Top 3 Gainers

Company	11-Feb	Prev_Day	% Change
Hindalco	295	279	5.73
RIL	2056	1974	4.12
Sun Pharma	644	627	2.64

Nifty 50 Top 3 Losers

Company	11-Feb	Prev_Day	% Change
NA	2818	2901	-2.87
NTPC	97	100	-2.55
Titan Industries Limited	1525	1563	-2.46

Advance Decline Ratio

	BSE	NSE
Advances	1682	1106
Declines	1314	833
Unchanged	130	98

Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	1884	39042
MF Flows**	-1118	-18710

*1st Feb 2021; **5th 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 10 Feb, 2021

Global Indices

- Asian markets witnessed mixed trend amid thin holiday trade with major bourses closed for the Lunar New Year holidays. Hopes of additional fiscal stimulus measures by the U.S. government instilled some confidence among the investors after Fed Chief said that the U.S. is still "very far" from a strong labor market. Today (as on Feb 12), Asian markets were mixed following rise on the Wall Street overnight. While Hang Seng was closed Nikkei fell 0.33% (as at 8 a.m. IST).
- European markets rose following some upbeat quarterly earnings reports and on continued optimism about a swifter global economic recovery amid quicker rollout of vaccination and anticipations of additional U.S. stimulus.
- U.S. markets rose on optimism about additional stimulus along with largely upbeat earnings news, a slowdown in the rate of coronavirus infections and accelerated vaccine rollouts.

Indian Equity Market

- Indian equity markets resumed its journey upward following strong buying in bluechip stocks. Some amount of volatility was also witnessed during intra-day trade owing to weekly expiry of index derivative contracts.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 0.43% and 0.44% to close at 51,531.52 and 15,173.30 respectively.
- The overall market breadth on BSE was strong with 1,682 scrips advancing and 1,314 scrips declining. A total of 130 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Energy was the major gainer, up 3.13% followed by S&P BSE Telecom, up 1.63% and S&P BSE Oil & Gas, up 1.52%. S&P BSE Capital Goods was the major loser, down 0.97% followed by S&P BSE Consumer Durables, down 0.43% and S&P BSE Auto, down 0.41%.

Domestic News

- According to the National Investment and Infrastructure Fund Ltd. (NIIFL), the New Development Bank (NDB) has committed to invest \$100 million into the NIIF Fund of Funds (FoF).
- According to a major global credit rating agency the recovery of the Indian economy will help in the improvement of asset quality of state run banks. This will lower the risk of a sharp deterioration in public sector banks. The global credit rating agency however warned that state run banks remain vulnerable to unexpected shocks which may restrict their credit growth.
- According to media reports and as per the minister of commerce and industry, the government has set up a committee which will consist of members from public sector and private sector. The members will look into issues which will help in promotion and localization of manufacturing activity.
- According to the Ministry of Coal, the government adopted various measures to achieve the target of augmentation of coal production capacity. Some of the steps which the government adopted are the launch of single window clearance system, simplification of guidelines for procedure and approval of mining plan, auctioning of coal mines for commercial sale and regular review and monitoring of allocated coal mines.
- According to media reports, the transportation infrastructure business of L&T Construction has got an order to extend the mainline corridor of the Mauritius Metro by 3.4 km. The contract is valued between Rs. 1,000 crore and Rs. 2,500 crore.
- According to media reports, the consolidated net profit of ITC fell by 11% to Rs. 3,587 crore from Rs. 4,050.40 crore in the same period of the previous year. Segment wise, revenue from cigarettes business rose to Rs. 6,091.17 crore from Rs. 5,944.86 crore in the same period of the previous year.

Good gets better



FII Derivative Trade Statistics		11-Feb		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	4279.79	4138.82	12458.02	
Index Options	578374.08	575813.18	109372.66	
Stock Futures	15095.79	15337.75	104041.76	
Stock Options	14205.15	14496.44	15776.54	
Total	611954.81	609786.19	241648.98	

Derivative Statistics- Nifty Options			
	11-Feb	Prev_Day	Change
Put Call Ratio (OI)	1.36	1.30	0.07
Put Call Ratio(Vol)	1.08	0.95	0.14

Debt Watch				
	11-Feb	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.25%	3.18%	3.19%	5.00%
T-Repo	3.20%	3.18%	3.20%	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	3.25%	3.36%	3.03%	5.05%
364 Day T-Bill	3.69%	3.50%	3.50%	5.25%
10 Year Gilt	6.02%	6.10%	5.93%	6.47%
G-Sec Vol. (Rs.Cr)	67260	29077	31115	42647
FBIL MIBOR ^[1]	3.45%	3.46%	3.48%	5.19%
3 Month CP Rate	3.75%	3.85%	3.55%	5.75%
5 Year Corp Bond	6.59%	6.54%	6.44%	7.10%
1 Month CD Rate	3.38%	3.34%	3.50%	5.13%
3 Month CD Rate	3.38%	3.35%	3.23%	5.46%
1 Year CD Rate	4.08%	4.02%	3.89%	6.09%

Currency Market			
Currency	11-Feb	Prev_Day	Change
USD/INR	72.78	72.85	-0.07
GBP/INR	100.77	100.68	0.09
EURO/INR	88.27	88.33	-0.06
JPY/INR	0.70	0.70	0.00

Commodity Prices				
Commodity	11-Feb	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	58.19	56.16	52.12	49.95
Brent Crude(\$/bl)	61.72	59.09	54.79	54.59
Gold(\$/oz)	1825	1792	1845	1567
Gold(Rs./10 gm)	47776	47263	49344	40468

Source: Refinitiv

[1] Data as on 10 Feb, 2021

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Derivatives Market

- Nifty Feb 2021 Futures stood at 15,184.95, a premium of 11.65 points above the spot closing of 15,173.30. The turnover on NSE's Futures and Options segment rose to Rs. 68,81,038.70 crore on February 11, 2021, compared with Rs. 46,51,298.26 crore on February 10, 2021.
- The Put-Call ratio stood at 0.97 compared with the previous session's close of 0.94.
- The Nifty Put-Call ratio stood at 1.36 compared with the previous session's close of 1.3.
- Open interest on Nifty Futures stood at 12.41 million, compared with the previous session's close of 12.18 million.

Indian Debt Market

- Bond yields declined for the second day as the Reserve Bank of India (RBI) purchased securities in the secondary market, and is anticipated to announce more open market operations (OMO).
- Yield on the 10-year benchmark paper (5.85% GS 2030) fell 5 bps to close at 5.96% from the previous close of 6.01% after trading in the wide range of 5.94% to 6.02%.
- RBI announced to conduct 14-day Variable Rate Reverse Repo auction under LAF for the notified amount of Rs. 2,00,000 crore on Feb 12, 2021.
- Banks borrowed Rs. 9 crore under the central bank's marginal standing facility on Feb 10, 2021 compared to that of Feb 09, 2021 when banks borrowed Rs. 38 crore.

Currency Market Update

- The Indian rupee was little changed as likely intervention by the Reserve bank of India (RBI) through greenback purchases via state-run banks, neutralised the impact of foreign flows in domestic equity market.
- Euro rose against the U.S. dollar after softer-than-expected U.S. inflation data for Jan 2021 and a reiteration of the U.S. Federal Reserve's dovish policy stance.

Commodity Market Update

- Gold prices closed almost steady as liquidity in the gold market remained light due to Lunar New Year holiday.
- Brent crude prices fell as market participants preferred to book profits from the recent rally.

International News

- Data from the U.S. Labour Department showed that initial jobless claims in U.S. for the week ended Feb 6, 2021 fell by 19,000 to 793,000 from the previous week's revised level of 812,000 (779,000 originally reported for the previous week).
- Data from the U.S. Commerce Department showed that wholesale inventories in U.S. rose by 0.3% on a monthly basis in Dec 2020 after remaining unchanged in Nov 2020. Inventories of durable goods grew 0.1% while that of non-durable goods grew 0.6%.

Good gets better

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