



Indices Performance

Global Indices	17-Feb	Prev_Day	Abs. Change	% Change
Russell 3000	2,056	2,064	-8	-0.38
Nasdaq	13,965	14,047	-82	-0.58
FTSE	6,711	6,749	-38	-0.56
Nikkei	30,292	30,468	-176	-0.58
Hang Seng	31,085	30,747	338	1.10
Indian Indices	17-Feb	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	51,704	52,104	-400	-0.77
Nifty 50	15,209	15,313	-105	-0.68
Nifty 100	15,319	15,406	-88	-0.57
Nifty 500	12,597	12,647	-50	-0.39
Nifty Bank	36,911	37,098	-187	-0.51
S&P BSE Power	2,371	2,342	30	1.26
S&P BSE Small Cap	19,883	19,779	105	0.53
S&P BSE HC	21,832	22,033	-201	-0.91

P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
17-Feb	36.01	0.69	41.49	1.04
Month Ago	34.12	0.81	39.34	1.10
Year Ago	24.97	1.04	27.42	1.27

Nifty 50 Top 3 Gainers

Company	17-Feb	Prev_Day	% Change
Hero Moto	3584	3462	3.54
Adani Ports & SEZ	656	637	3.02
SBI	412	402	2.34

Nifty 50 Top 3 Losers

Company	17-Feb	Prev_Day	% Change
Nestle India Limited	16741	17217	-2.77
Bajaj Finserv Limited	10186	10461	-2.63
Asian Paints	2388	2450	-2.53

Advance Decline Ratio

	BSE	NSE
Advances	1476	914
Declines	1491	1010
Unchanged	140	91

Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	2212	42486
MF Flows**	-1118	-18710

*17th Feb 2021; **5th Feb 2021

Economic Indicator

YoY(%)	Current	Quarter Ago	Year Ago
CPI	4.06% (Jan-21)	7.61% (Oct-20)	7.59% (Jan-20)
IIP	1.00% (Dec-20)	1.00% (Sep-20)	0.40% (Dec-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 16 Feb, 2021

Global Indices

- Asian markets largely closed in the red with investors remaining cautious and monitoring U.S. bond yields following a recent rise. The move up in yields has been driven by increasing inflationary concerns. Today (as on Feb 18) markets are majorly trading higher as investors watch for movements in mainland Chinese stocks, which are set to return from the Lunar New Year holiday. While Nikkei is up 0.16%, Hang Seng is down 0.49% (as at 8:00 AM).
- European markets went down amid concerns over U.S. inflation and rising treasury yields.
- U.S. markets largely remained weak amid inflationary concern and after a series of upbeat economic data led to speculation that the lawmakers may go slow on passing additional stimulus.

Indian Equity Market

- Indian equity markets held its bearish steam throughout the day and the benchmark indices recorded loss of nearly one percent forming a bearish candle for the second consecutive day. Mixed set of global cues kept investors on the sidelines.
- Key benchmark indices S&P BSE Sensex and Nifty 50 lost 0.77% and 0.68% to close at 51,703.83 and 15,208.90 respectively.
- The overall market breadth on BSE was weak with 1,476 scrips advancing and 1,491 scrips declining. A total of 140 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Power was the major gainer, up 1.26% followed by S&P BSE Telecom, up 0.95% and S&P BSE Energy, up 0.84%. S&P BSE Healthcare was the major loser, down 0.91% followed by S&P BSE IT, down 0.89% and S&P BSE Finance, down 0.88%.

Domestic News

- The Prime Minister of India announced his planning to spend around Rs. 7.5 trillion to build oil and gas infrastructure over the next five years. The Prime Minister further added that India is working to meet its rising demand for energy and is also reducing its dependency on imports of energy.
- The Union Food Processing Industries Ministry said it has cleared 20 projects worth Rs. 363.4 crore under two central government schemes. For these projects, which together are expected to create almost 12,000 jobs and benefit 42,800 farmers, the government will provide a grant-in-aid of Rs. 102.91 crore.
- The Union Cabinet approved signing of a comprehensive economic cooperation agreement, a kind of a free trade pact, between India and Mauritius which is aimed at liberalising norms to boost two-way commerce. The agreement will cover 310 Indian exports, including foodstuffs and beverages, agricultural goods, cloth and textile articles, base metals, electrical and electronic articles, plastics and chemicals, wood and articles thereof.
- The government approved Rs. 12,195 crore production-linked incentive (PLI) scheme for the production of telecommunications gear in India, a move that will place the nation ahead of 5G roll-outs as a global powerhouse for the production of such equipment. The PLI scheme will be operational from 1 April 2021 for the manufacture of telecommunications gear.
- Flipkart has partnered with ICICI Lombard to provide its customers with 'Group SafeGuard' insurance, a group insurance scheme. Group SafeGuard is a benefit offering that allows consumers to avail a payout for each day of hospitalization as compared to the standard indemnity health insurance policies.
- Adani Ports and Special Economic Zone (APSEZ) has completed the acquisition of 100% stake of Dighi Port Ltd (DPL) for Rs. 705 crore.

Good gets better

FII Derivative Trade Statistics		17-Feb	
(Rs Cr)	Buy	Sell	Open Int.
Index Futures	4517.47	5125.12	14224.89
Index Options	490430.38	486718.36	115497.60
Stock Futures	15906.51	16676.78	108106.89
Stock Options	19662.66	19611.85	17928.46
Total	530517.02	528132.11	255757.84

Derivative Statistics- Nifty Options			
	17-Feb	Prev_Day	Change
Put Call Ratio (OI)	1.17	1.29	-0.12
Put Call Ratio(Vol)	0.93	0.99	-0.06

Debt Watch				
	17-Feb	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.22%	3.25%	3.22%	4.93%
T-Repo	2.26%	3.22%	3.20%	4.85%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	3.26%	3.31%	3.10%	5.02%
364 Day T-Bill	3.70%	3.70%	3.21%	5.20%
10 Year Gilt	6.03%	6.01%	5.95%	6.39%
G-Sec Vol. (Rs.Cr)	18736	29063	29281	47709
FBIL MIBOR ⁽¹⁾	3.46%	3.45%	3.46%	5.15%
3 Month CP Rate	3.70%	3.75%	3.75%	5.70%
5 Year Corp Bond	6.67%	6.63%	6.54%	6.98%
1 Month CD Rate	3.43%	3.33%	3.53%	5.13%
3 Month CD Rate	3.32%	3.41%	3.32%	5.29%
1 Year CD Rate	4.04%	4.07%	3.90%	5.82%

Currency Market			
Currency	17-Feb	Prev_Day	Change
USD/INR	72.84	72.72	0.11
GBP/INR	101.15	101.33	-0.18
EURO/INR	88.06	88.26	-0.20
JPY/INR	0.69	0.69	0.00

Commodity Prices				
Commodity	17-Feb	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	61.06	58.66	52.22	51.98
Brent Crude(\$/bl)	65.28	61.23	54.52	58.67
Gold(\$/oz)	1776	1842	1827	1581
Gold(Rs./10 gm)	46490	47778	49285	40728

Source: Refinitiv

[1] Data as on 16 Feb, 2021

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Derivatives Market

- Nifty Feb 2021 Futures stood at 15,207.05, a discount of 1.85 points below the spot closing of 15,208.90. The turnover on NSE's Futures and Options segment rose to Rs. 43,17,511.33 crore on February 17, 2021, compared with Rs. 36,60,812.75 crore on February 16, 2021.
- The Put-Call ratio stood at 0.91 compared with the previous session's close of 0.98.
- The Nifty Put-Call ratio stood at 1.17 compared with the previous session's close of 1.29.
- Open interest on Nifty Futures stood at 13.04 million, compared with the previous session's close of 12.69 million.

Indian Debt Market

- Bond yields was little changed for a second day, while market participants awaited a weekly government debt auction on Thursday.
- Yield on the 10-year benchmark paper (5.85% GS 2030) rose 1 bps to close at 6.03% from the previous close of 6.02% after moving in a range of 6.02% to 6.04%.
- RBI conducted the auction of 91 days, 182 days and 364 days Treasury Bills auction for the notified amount of Rs. 4,000 crore, Rs. 7,000 crore and Rs. 8,000 crore, respectively, which was fully accepted. The cut-off stood at Rs. 99.2123 (YTM: 3.1845%), Rs. 98.2750 (YTM: 3.5202%) and Rs. 96.4323 (YTM: 3.7099%), respectively.
- Banks did not borrowed under the central bank's marginal standing facility on Feb 16, 2021 compared to that of Feb 15, 2021 when banks borrowed Rs. Rs. 2 crore.

Currency Market Update

- The Indian rupee recorded its biggest single-session decline against the U.S. dollar in over two weeks following rise in the U.S. 10-year treasury yield to a one-year high and a rebound in the greenback index.
- Euro fell against the U.S. dollar as U.S. bond yields jumped on the prospects of further economic recovery and a possible acceleration in inflation.

Commodity Market Update

- Gold prices fell on hopes of a pickup in global economic activity.
- Brent crude prices rose on hopes of an improvement in demand due to COVID-19 vaccinations.

International News

- According to data from the Office for National Statistics, U.K.'s consumer price inflation rose marginally to 0.7% in Jan 2021 from 0.6% in Dec 2020. On monthly basis, consumer prices fell 0.2% in Jan 2021 after increasing 0.3% in Dec 2020.
- According to the Ministry of Finance, Japan posted a merchandise trade deficit of 323.9 billion yen in Jan 2021 following surplus of 751 billion yen in Dec 2020. In Jan 2020, the trade deficit was 1,315.111 billion yen.
- According to data from Eurostat, eurozone's construction output fell 3.7% MoM in Dec 2020 following 2.3% rise in Nov 2020. On a yearly basis, construction output fell 2.3% in Dec following 0.6% decrease in Nov.

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