



### Indices Performance

Global Indices	31-Dec	Prev_Day	Abs. Change	% Change
Russell 3000	1,953	1,948	4	0.22
Nasdaq	12,888	12,870	18	0.14
FTSE	6,461	6,556	-95	-1.45
Nikkei <sup>[2]</sup>	27,444	27,568	-124	-0.45
Hang Seng	27,231	27,147	84	0.31
Indian Indices	01-Jan	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	47,869	47,751	118	0.25
Nifty 50	14,019	13,982	37	0.26
Nifty 100	14,138	14,091	47	0.33
Nifty 500	11,575	11,518	57	0.49
Nifty Bank	31,226	31,264	-38	-0.12
S&P BSE Power	2,076	2,062	14	0.68
S&P BSE Small Cap	18,261	18,098	163	0.90
S&P BSE HC	21,855	21,681	173	0.80

### P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
1-Jan	33.50	0.83	38.55	1.13
Month Ago	32.05	0.90	36.05	1.21
Year Ago	25.99	1.03	28.33	1.24

### Nifty 50 Top 3 Gainers

Company	01-Jan	Prev_Day	% Change
Adani Ports & SEZ	504	484	4.16
ITC	214	209	2.32
TCS	2928	2863	2.29

### Nifty 50 Top 3 Losers

Company	01-Jan	Prev_Day	% Change
ICICI Bank	528	535	-1.41
SBI Life Insurance Company Limited	895	904	-0.98
Hindalco	238	241	-0.91

### Advance Decline Ratio

	BSE <sup>[1]</sup>	NSE
Advances	1748	1317
Declines	1282	591
Unchanged	140	93

### Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	1763	170260
MF Flows**	-1156	-46995

\*31<sup>st</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 31 Dec, 2020; [2] Data as on 30 Dec, 2020

### Global Indices

- Asian markets remained closed as market participants remained away from their trading desk on the occasion of New Year. Today (as on Jan 04), Asian markets were mixed as the first trading session of 2021 kicked off. Both Nikkei and Hang Seng fell 1.11% and 0.53%, respectively (as at 8 a.m. IST).
- European markets were closed on the occasion of New Year holiday.
- U.S. markets were closed on the occasion of New Year holiday.

### Indian Equity Market

- Indian equity markets ended the first trading session of the new calendar year 2021 on a positive note with key benchmark indices touching all-time highs. The combined effect of foreign fund inflows and real earnings growth kept the market rallying. Optimism over economic growth amid encouraging developments on COVID-19 vaccine front, and expectations that the government will announce additional stimulus measures also kept investor sentiments positive.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 0.25% and 0.26% to close at 47,868.98 and 14,018.50 respectively.
- The overall market breadth on BSE was strong with 2,044 scrips advancing and 967 scrips declining. A total of 159 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Telecom was the major gainer, up 1.4% followed by S&P BSE Industrials, up 1.26% and S&P BSE Capital Goods, up 1.07%. S&P BSE Bankex was the major loser, down 0.25% followed by S&P BSE Consumer Durables, down 0.11%.

### Domestic News

- Data from the Ministry of Finance showed that the gross GST (goods and services tax) revenue collected in Dec 2020 stood at Rs. 1,15,174 crore. GST revenue collected in Dec 2020 thus was the highest since the introduction of GST and also it was the first time that collections surpassed Rs. 1.15 lakh crore. Prior to Dec 2020, the highest GST collection was witnessed in Apr 2019 which stood at Rs. 1,13,866 crore. GST revenue collected in Dec 2020 was also 12% higher than the GST revenues collected in the corresponding period of the previous year.
- Capital market regulator Securities and Exchange Board of India (SEBI) has decided to extend the deadline for implementation of diligence framework for debenture trustees to Apr 1, 2021 from Jan 1, 2021.
- SEBI mandated that proxy advisors need to alert clients within 24 hours of receipt of information regarding any impending material modifications or factual errors in their reports. In addition, SEBI added that any such material revisions in their reports need to be communicated to the clients within 72 hours of the receipt of information in order to ensure that the client has adequate time for making any informed decision.
- SEBI after taking into account the challenges arising out of the prevailing business and market conditions on account of COVID-19 pandemic has decided to extend the timeline for compliance with various regulatory requirements. The timeline for maintaining call recordings of orders/instructions received from clients has been extended to Feb 28, 2021. The deadline for uploading KYC (Know Your Customer) application form and other supporting documents on system of KRA (KYC Registration Agency) within 10 working days has been extended from Jan 1, 2021 to Feb 28, 2021. SEBI also gave a 15-day time period after Feb 28, 2021 to clear the backlog.
- Praj Industries said it has received an order of Rs. 226.90 crore from Indian Oil Corporation Ltd.
- Ashok Leyland has posted 56% increase in M&HCV trucks sales in Dec 2020 to 5,930 units as against 3,809 units in Dec 2019. Bus sales fell by around 90% to 245 units from 2,560 units.

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FII Derivative Trade Statistics		01-Jan		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	6016.61	6484.96	20489.51	
Index Options	344157.13	341133.93	108751.05	
Stock Futures	26716.90	26447.25	99791.42	
Stock Options	4663.51	4797.16	7691.14	
Total	381554.15	378863.30	236723.12	

Derivative Statistics- Nifty Options			
	01-Jan	Prev_Day	Change
Put Call Ratio (OI)	1.44	1.56	-0.12
Put Call Ratio(Vol)	1.04	1.06	-0.03

Debt Watch				
	01-Jan	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.20%	3.23%	3.09%	5.12%
T-Repo	2.66%	3.17%	2.93%	4.60%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	2.97%	3.10%	2.92%	4.99%
364 Day T-Bill	3.36%	3.45%	3.39%	5.29%
10 Year Gilt	5.90%	5.93%	5.91%	6.50%
G-Sec Vol. (Rs.Cr)	25135	33530	28045	41735
FBIL MIBOR	3.47%	3.45%	3.40%	5.25%
3 Month CP Rate	3.55%	3.30%	3.18%	5.85%
5 Year Corp Bond	6.30%	6.37%	6.45%	7.63%
1 Month CD Rate	3.01%	3.15%	3.05%	4.94%
3 Month CD Rate	2.99%	3.10%	3.28%	5.10%
1 Year CD Rate	3.77%	3.79%	3.60%	6.12%

Currency Market			
Currency	01-Jan	Prev_Day	Change
USD/INR	73.03	73.05	-0.02
GBP/INR	99.80	99.60	0.20
EURO/INR	89.23	89.79	-0.57
JPY/INR	0.71	0.71	0.00

Commodity Prices				
Commodity	31-Dec	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl) <sup>[1]</sup>	48.32	48.16	44.49	61.11
Brent Crude(\$/bl) <sup>[1]</sup>	50.86	50.43	47.00	68.96
Gold( \$/oz)	1898	1876	1815	1517
Gold(Rs./10 gm)	50040	49787	48314	38995

Source: Refinitiv

[1] Data as on 31 Dec, 2020, [2] Data as on 30 Dec, 2020

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### Derivatives Market

- Nifty Jan 2021 Futures stood at 14,053.85, a premium of 35.35 points above the spot closing of 14,018.50. The turnover on NSE's Futures and Options segment fell to Rs. 9,83,042.05 crore on January 01, 2021, compared with Rs. 57,82,890.81 crore on December 31, 2020.
- The Put-Call ratio stood at 0.95 compared with the previous session's close of 1.03.
- The Nifty Put-Call ratio stood at 1.37 compared with the previous session's close of 1.44.
- Open interest on Nifty Futures stood at 13.15 million, compared with the previous session's close of 16.76 million.

### Indian Debt Market

- Bond yields almost remained unchanged amid weekly auction of government securities.
- Yield on the 10-year benchmark paper (5.77% GS 2030) was unchanged at 5.90% from the previous close after trading in the range of 5.89% to 5.90%.
- According to the RBI's data released in the weekly statistical supplement, India's foreign exchange reserves fell \$0.290 billion to \$580.84 billion in the week ended Dec 25, 2020 from \$581.13 billion in the previous week.
- Banks did not borrowed under the central bank's marginal standing facility on Dec 31, compared to Rs. 11 crore borrowing on Dec 30.

### Currency Market Update

- The Indian rupee eased against the U.S. dollar on the first day of 2021 but recorded its biggest weekly rise in six weeks, supported by consistent greenback inflows into domestic equity market and exporters' dollar sales.
- Euro was flat against the U.S. dollar amid thinly trading session on New Year day.

### Commodity Market Update

- Gold prices rose following coronavirus lockdowns in Britain.
- Brent crude prices rose as vaccine optimism boosted market sentiments.

### International News

- According to the Hellenic Statistical Authority, Greece retail sales volume increased 4.7% YoY in Oct 2020 as against 4% decline in Sep 2020. On a monthly basis, retails sales volume rose 3.8% in Oct following 0.2% fall in Sep.
- According to data from Statistics Korea, South Korea's consumer price inflation fell 0.5% in Dec 2020 from 0.6% in Nov 2020. On monthly basis, consumer prices rose 0.2% in Dec as against 0.1% fall in Nov.

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