

### Indices Performance

Global Indices	12-Jan	Prev_Day	Abs. Change	% Change
Russell 3000	1,959	1,960	-1	-0.05
Nasdaq	13,072	13,036	36	0.28
FTSE	6,754	6,798	-44	-0.65
Nikkei	28,164	28,139	25	0.09
Hang Seng	28,277	27,908	369	1.32
Indian Indices	12-Jan	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	49,517	49,269	248	0.50
Nifty 50	14,563	14,485	79	0.54
Nifty 100	14,706	14,642	63	0.43
Nifty 500	12,058	12,007	52	0.43
Nifty Bank	32,339	31,999	340	1.06
S&P BSE Power	2,116	2,118	-1	-0.05
S&P BSE Small Cap	18,923	18,876	46	0.25
S&P BSE HC	22,242	22,382	-140	-0.63

### P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
12-Jan	34.55	0.80	39.94	1.09
Month Ago	32.98	0.88	37.16	1.18
Year Ago	26.32	1.01	28.51	1.23

### Nifty 50 Top 3 Gainers

Company	12-Jan	Prev_Day	% Change
Tata Motors	238	221	7.77
GAIL	141	136	4.20
NA	2882	2777	3.76

### Nifty 50 Top 3 Losers

Company	12-Jan	Prev_Day	% Change
Asian Paints	2721	2849	-4.52
Titan Industries Limited	1527	1564	-2.35
HUL	2376	2429	-2.19

### Advance Decline Ratio

	BSE	NSE
Advances	1664	1037
Declines	1435	917
Unchanged	154	71

### Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	2940	13771
MF Flows**	-1822	-6397

\*12<sup>th</sup> Jan 2021; \*\*8<sup>th</sup> Jan 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 11 Jan, 2021

### Global Indices

- Asian markets witnessed mixed trend with investors awaiting details of U.S. President elect's proposed economic stimulus plan. Worries over a highly infectious COVID-19 strain and fears of renewed global lockdowns also kept underlying sentiment cautious. Today (as on Jan 13), markets are trading mixed as investors tracked developments on the coronavirus front. Both Nikkei and Hang Seng are up 0.03% and 0.12% (as at 8:00 AM IST), respectively.
- European markets went down amid persisting worries about rising coronavirus cases and tighter lockdown measures in several countries.
- U.S. markets managed to close in the green, led by optimism about another big fiscal stimulus plan soon.

### Indian Equity Market

- Indian equity markets edged higher despite RBI's caution over elevated NPA levels in 2021. Investor sentiments were buoyed in anticipation of healthy quarterly results for Q3FY21 from major companies across all the sectors.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 0.5% and 0.54% to close at 49,517.11 and 14,563.45 respectively.
- The overall market breadth on BSE was strong with 1,664 scrips advancing and 1,435 scrips declining. A total of 154 scrips remained unchanged.
- On the BSE sectoral front, S&P BSE Telecom was the major gainer, up 2.85% followed by S&P BSE Realty, up 2.84% and S&P BSE Energy, up 2.65%. S&P BSE Consumer Durables was the major loser, down 0.97% followed by S&P BSE Healthcare, down 0.63% and S&P BSE Capital Goods, down 0.47%.

### Domestic News

- Government data showed that the consumer price index based inflation fell to 4.59% in Dec 2020 from 6.93% in the previous month. The Consumer Food Price Index fell to 3.41% in Dec 2020 from 9.50% in the previous month. Under food and beverages, retail inflation for pulses and products stood at 15.98% while that for oil and fats stood at 20.05%. Retail inflation for fuel and light and housing stood at 2.99% and 3.21% respectively.
- Government data showed that the index of industrial production (IIP) contracted 1.9% in Nov 2020 as compared to a growth of 2.1% in the same period of the previous year. For the period from Apr to Nov of 2020, IIP contracted 15.5% as compared to a growth of 0.3% in the same period of the previous year. The decline came as the manufacturing sector contracted 1.7% in Nov 2020 as compared to a growth of 3.0% in the same period of the previous year. For the period from Apr to Nov of 2020, the manufacturing sector contracted 17.3% as compared to a growth of 0.4% in the same period of the previous year. All sectors contracted in Nov 2020 barring the electricity sector and Infrastructure/Construction goods sector which witnessed a growth of 3.5% and 0.7% respectively.
- Tata Consultancy Services (TCS) said that for USD12,471, it will acquire GE's interest in Tata Consultancy Services Saudi Arabia.
- Larsen & Toubro Infotech (LTI) is extending its multi-year global partnership with IBM in order to help companies transform their activities through hybrid cloud adoption. LTI can allow customers to migrate and modernize core business applications using cloud offerings from IBM. LTI and IBM are preparing to set up an innovation centre in Bengaluru in 2021 as part of this partnership.

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FII Derivative Trade Statistics		12-Jan	
(Rs Cr)	Buy	Sell	Open Int.
Index Futures	2901.73	4258.86	13301.21
Index Options	231385.03	229870.96	81202.18
Stock Futures	13352.53	12655.75	101164.63
Stock Options	9570.45	9707.70	11267.71
<b>Total</b>	<b>257209.74</b>	<b>256493.27</b>	<b>206935.73</b>

Derivative Statistics- Nifty Options			
	12-Jan	Prev_Day	Change
Put Call Ratio (OI)	1.73	1.80	-0.07
Put Call Ratio(Vol)	0.92	1.06	-0.14

Debt Watch				
	12-Jan	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.19%	3.15%	3.13%	4.99%
T-Repo	3.14%	2.96%	3.08%	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 <sup>[1]</sup>	3.03%	3.00%	3.00%	5.02%
364 Day T-Bill	3.43%	3.42%	3.40%	5.23%
10 Year Gilt	5.93%	5.85%	5.93%	6.59%
G-Sec Vol. (Rs.Cr)	20832	31123	45292	34381
FBIL MIBOR <sup>[1]</sup>	3.48%	3.47%	3.48%	5.22%
3 Month CP Rate	3.55%	3.50%	3.35%	5.80%
5 Year Corp Bond	6.49%	6.30%	6.36%	7.48%
1 Month CD Rate	3.44%	3.12%	3.13%	5.03%
3 Month CD Rate	3.25%	2.99%	3.09%	5.09%
1 Year CD Rate	3.83%	3.77%	3.76%	6.09%

Currency Market			
Currency	12-Jan	Prev_Day	Change
USD/INR	73.37	73.45	-0.08
GBP/INR	99.37	99.18	0.19
EURO/INR	89.17	89.49	-0.32
JPY/INR	0.70	0.71	0.00

Commodity Prices				
Commodity	12-Jan	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	53.05	49.75	46.54	58.99
Brent Crude(\$/bl)	55.88	52.80	50.73	68.16
Gold( \$/oz)	1856	1949	1839	1562
Gold(Rs./10 gm)	49488	51465	48985	39607

Source: Refinitiv

[1] Data as on 11 Jan, 2021

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### Derivatives Market

- Nifty Jan 2021 Futures stood at 14,597.95, a premium of 34.50 points above the spot closing of 14,563.45. The turnover on NSE's Futures and Options segment rose to Rs. 25,88,858.22 crore on January 12, 2021, compared with Rs. 21,16,222.61 crore on January 11, 2021.
- The Put-Call ratio stood at 0.85 compared with the previous session's close of 1.
- The Nifty Put-Call ratio stood at 1.73 compared with the previous session's close of 1.8.
- Open interest on Nifty Futures stood at 15.21 million, compared with the previous session's close of 15.12 million.

### Indian Debt Market

- After rising yesterday, bond yields remained almost steady ahead of the consumer price index (CPI) based inflation for Dec 2020.
- Yield on the 10-year benchmark paper (5.77% GS 2030) remained unchanged to 5.93% from the previous close after trading in the range of 5.92% to 5.94%.
- Banks did not borrow under the central bank's marginal standing facility on Jan 8, 2020 and Jan 11, 2020.

### Currency Market Update

- The Indian rupee gained against the U.S. dollar as inflows in domestic equity market outweighed the negative impact of a further rebound in the U.S. dollar index and the U.S. Treasury yields.
- Euro rose against the U.S. dollar on growing possibility that the new U.S. administration will adopt additional stimulus measures to combat the COVID-19 pandemic.

### Commodity Market Update

- Gold prices rose on hopes of additional stimulus measures from the new U.S. administration.
- Brent crude prices rose after Saudi Arabia planned to cut output by an extra 1 million barrels per day (bpd) in Feb and Mar of 2020.

### International News

- According to data from the Cabinet Office, Japan's Economy Watchers' Survey, which measures the current situation of the economy, fell to 35.5 in Dec 2020 from 45.6 in Nov 2020. The outlook index that signals future activity rose to 37.1 in Dec from 36.5 in Nov.
- According to data released by the British Retail Consortium, U.K. total retail sales fell 0.3% in 2020. This noted the worst annual change since records began in 1995. Food sales rose 5.4% and non-food product sales fell 5% from 2019.
- According to the Ministry of Finance, Japan reported a current account surplus of 1,878.4 billion yen in Nov 2020 down from 2,144.7 billion yen in Oct 2020. Exports fell 3.4% YoY to 6.039 trillion yen, while imports fell 13.6% YoY to 5.423 trillion yen.

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