



Indices Performance

Global Indices	19-Jan	Prev_Day	Abs. Change	% Change
Russell 3000	1,963	1,940	23	1.19
Nasdaq	13,197	12,999	199	1.53
FTSE	6,713	6,721	-8	-0.11
Nikkei	28,633	28,242	391	1.39
Hang Seng	29,642	28,863	780	2.70
Indian Indices	19-Jan	Prev_Day	Abs. Change	% Change
S&P BSE Sensex	49,398	48,564	834	1.72
Nifty 50	14,521	14,281	240	1.68
Nifty 100	14,632	14,390	242	1.68
Nifty 500	11,982	11,776	206	1.75
Nifty Bank	32,425	31,812	613	1.93
S&P BSE Power	2,126	2,069	57	2.77
S&P BSE Small Cap	18,635	18,330	305	1.66
S&P BSE HC	21,854	21,525	328	1.53

P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
19-Jan	34.08	0.81	39.22	1.09
Month Ago	33.60	0.86	37.84	1.15
Year Ago	26.13	1.01	28.61	1.24

Nifty 50 Top 3 Gainers

Company	19-Jan	Prev_Day	% Change
Bajaj Finserv Limited	8924	8355	6.82
Tata Motors	259	246	5.16
Bajaj Finance	4959	4720	5.07

Nifty 50 Top 3 Losers

Company	19-Jan	Prev_Day	% Change
Tech Mahindra	993	998	-0.58
ITC	219	220	-0.41
Wipro	430	432	-0.30

Advance Decline Ratio

	BSE	NSE
Advances	2102	1431
Declines	901	517
Unchanged	143	82

Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	1952	19389
MF Flows**	-524	-11586

*19th Jan 2021; **15th 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 18 Jan, 2021

Global Indices

- Asian markets largely went up as optimism about vaccine rollouts and positive vibes from COVID-19 relief stimulus announcement by U.S. President-elect outweighed concerns over the worldwide spread of the coronavirus. Today (as on Jan 20), Asian markets were mixed as investors wait for the release of China's latest benchmark lending rate. Both Nikkei and Hang Seng fell 0.17% and 0.15%, respectively (as at 8 a.m. IST).
- European markets fell on worries about the economic impact of surging coronavirus cases and stricter lockdown restrictions in several places across the continent. However, hopes of a large stimulus in the U.S., the rollout of coronavirus vaccines in several countries, restricted large losses.
- U.S. markets rose on continued optimism about additional stimulus as well as a faster rollout of coronavirus vaccines under incoming President Joe Biden.

Indian Equity Market

- Indian equity markets went up, led by value buying at lower levels, better than expected earnings from Indian companies in Dec quarter and sustained buying of domestic equities by foreign investors.
- Key benchmark indices S&P BSE Sensex and Nifty 50 gained 1.72% and 1.68% to close at 49,398.29 and 14,521.15 respectively.
- The overall market breadth on BSE was strong with 2,102 scrips advancing and 901 scrips declining. A total of 143 scrips remained unchanged.
- On the BSE sectoral front, all sectors gained. S&P BSE Realty was the major gainer, up 4.04%, followed by S&P BSE Metal and S&P BSE Power, up 3.01% and 2.77%, respectively. S&P BSE Capital Goods and S&P BSE Industrials gained 2.7% and 2.68% respectively.

Domestic News

- According to SEBI, investment through participatory notes (P-notes) in the domestic capital market rose to a 31-month high of Rs. 87,132 crore at Dec 2020-end from Rs. 83,114 crore at the Nov 2020-end. Dec-end reading reflects the bullish stance of FPIs.
- According to a report, throughout the remaining financial year, the Reserve Bank of India (RBI) is expected to spend at least USD 20 billion more to help the rupee and lift the forex kitty, raising its total forex intervention to USD 93 billion.
- According to a major rating agency, in Dec 2020, economic activity reported a wide-ranging increase compared to Nov 2020, showing a return on demand. In Dec 2020, most of the indicators showed a YoY expansion, which signals a tentative return to pre-COVID normalcy.
- Dunzo announced that it raised a fresh round of USD 40 million in capital from a clutch of investors including Google and Lightbox, among others.
- HT Media reported 54.08% fall in consolidated net profit at Rs. 9.43 crore for the quarter ended Dec 31, 2020 as against net profit of Rs. 20.54 crore during the same quarter last year. The profit reduced on account of lower total income.

Good gets better

FII Derivative Trade Statistics		19-Jan		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	4385.51	4652.74	11899.30	
Index Options	365127.48	364073.64	84667.19	
Stock Futures	15247.32	13920.68	99113.36	
Stock Options	12528.46	12662.00	15186.37	
Total	397288.77	395309.06	210866.22	

Derivative Statistics- Nifty Options			
	19-Jan	Prev_Day	Change
Put Call Ratio (OI)	1.36	1.12	0.24
Put Call Ratio (Vol)	0.98	0.85	0.13

Debt Watch				
	19-Jan	Wk. Ago	Mth. Ago	Year Ago
Call Rate	3.16%	3.19%	3.22%	5.02%
T-Repo	3.22%	3.14%	3.23%	4.98%
Repo	4.00%	4.00%	4.00%	5.15%
Reverse Repo	3.35%	3.35%	3.35%	4.90%
91 Day T-Bill	3.23%	3.03%	3.09%	5.09%
364 Day T-Bill	3.43%	3.43%	3.33%	5.10%
10 Year Gilt	5.98%	5.93%	5.96%	6.63%
G-Sec Vol. (Rs.Cr)	22045	20832	23604	49149
FBIL MIBOR ^[1]	3.47%	3.47%	3.40%	5.22%
3 Month CP Rate	3.80%	3.55%	3.35%	5.80%
5 Year Corp Bond	6.51%	6.49%	6.30%	7.45%
1 Month CD Rate	3.51%	3.44%	3.09%	5.11%
3 Month CD Rate	3.35%	3.25%	3.09%	5.62%
1 Year CD Rate	3.88%	3.83%	3.74%	6.12%

Currency Market			
Currency	19-Jan	Prev_Day	Change
USD/INR	73.18	73.22	-0.04
GBP/INR	99.57	99.35	0.22
EURO/INR	88.51	88.41	0.10
JPY/INR	0.70	0.71	0.00

Commodity Prices				
Commodity	19-Jan	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	52.84	53.05	48.99	58.55
Brent Crude(\$/bl)	55.52	55.88	52.54	64.34
Gold(\$/oz)	1839	1856	1881	1556
Gold(Rs./10 gm)	48977	49488	49939	39804

Source: Refinitiv

[1] Data as on 18 Jan, 2021

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Derivatives Market

- Nifty Jan 2021 Futures stood at 14,570.00, a premium of 48.85 points above the spot closing of 14,521.15. The turnover on NSE's Futures and Options segment fell to Rs. 26,94,872.77 crore on January 19, 2021, compared with Rs. 27,57,799.06 crore on January 18, 2021.
- The Put-Call ratio stood at 0.91 compared with the previous session's close of 0.9.
- The Nifty Put-Call ratio stood at 1.36 compared with the previous session's close of 1.12.
- Open interest on Nifty Futures stood at 13.92 million, compared with the previous session's close of 13.84 million.

Indian Debt Market

- Bond yields fell for the second day as market participants anticipate the Reserve Bank of India (RBI) to continue buying government securities in the coming weeks.
- Yield on the 10-year benchmark paper (5.77% GS 2030) fell 2 bps to close at 5.94% from the previous close of 5.96% after trading in the range of 5.93% to 5.96%.
- Banks borrowed Rs. 121 crore under the central bank's marginal standing facility on Jan 18, 2020 compared with Rs. 96 crore borrowed on Jan 15, 2020.

Currency Market Update

- The Indian rupee gained after falling in the last two sessions against the greenback following decline in the U.S. dollar index amid a rebound in regional equities and currencies.
- Euro rose against the U.S. dollar as market participants prepared for U.S. Treasury Secretary nominee Janet Yellen to talk up the need for major fiscal stimulus.

Commodity Market Update

- Gold prices fell on profit booking to some extent.
- Brent crude prices rose on hopes that additional stimulus measures from the government will help lift global economic growth. However, concerns over renewed COVID-19 pandemic lockdowns capped the gains.

International News

- According to the ZEW - Leibniz Centre for European Economic Research, Germany's economic Sentiment rose 6.8 points to 61.8 in Jan 2021. Similarly, the current situation index rose slightly to -66.4 from -66.5 in Dec 2020.
- According to data from Destatis, Germany's consumer price index fell 0.3% YoY in Dec 2020, same as seen in Nov 2020. On a monthly basis, consumer prices rose 0.5% in Dec 2020, as estimated previously.
- According to the European Central Bank, eurozone current account surplus fell to EUR 25 billion in Nov 2020 from EUR 26 billion in Oct 2020. The current account surplus declined due to a sharp fall in secondary income.

Good gets better

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