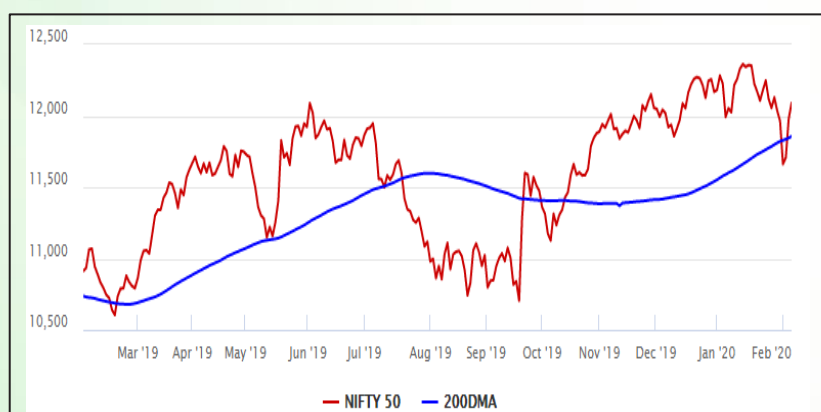


Equity Market

- ❖ Sensex rises for 3rd day in a row, rallies 353 points to 41,142
- ❖ Most Index heavyweights witness strong growth
- ❖ Nifty P/E at 27.05, Nifty Midcap 100 P/E at 25.75

S&P CNX Nifty - 200 DMA



Nifty Equity Benchmark Indices

Index	Current Value	%chg	52 wkhigh	52 wklow
Nifty 50	12089.2	0.94	12430.5	10585.6
Nifty Mid cap 100	18115.7	1.18	18495.9	14975.8
Nifty Small cap 100	6205.3	0.77	6822.5	5114.6
Bank	31002.0	1.10	32613.1	26560.6
Auto	8131.7	0.46	9059.4	6727.6
FMCG	30934.4	0.52	32644.9	28099.2
Pharma	8125.6	0.36	9578.4	7047.1
Realty	326.4	2.17	336.4	220.6

Factors driving the market

- ❖ Bharti Airtel climbs 3% as ARPU improves in December quarter
- ❖ Tata Motors shares jump as it unveils a series of cars and commercial vehicles at the Auto Expo 2020
- ❖ Broader market extends rally

Nifty Top Gainers/Losers

Index	Value	52 wkhigh	52 wklow
Top Gainers	-	-	-
Tata Motors	183.4	239.4	106.0
Yes Bank	38.0	286.0	29.0
Tata Steel	477.9	561.7	320.35
Top Losers	-	-	-
ZEEL	228.9	489.0	199.2
Hero MotoCorp	2374.0	3022.9	2225.6
Dr Reddy's Lab	3142.0	3277.6	1873.0

Equity FPI Inflows

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
05-Feb-20	8110.2	7187.3	923.0
04-Feb-20	9548.4	7697.8	1850.6
03-Feb-20	8006.1	12381.7	(4375.6)
Total Jan-2020	116261.5	104139.0	12122.6
Total Dec-2019	110961.4	103623.0	7338.4
Total 2019	1437559.6	1336438.9	101120.8

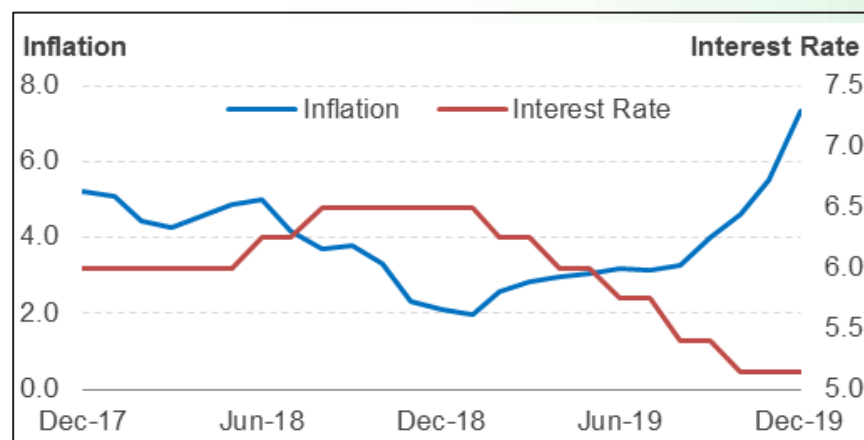
Debt Market

- ❖ Outcome of last MPC meet for FY 2020 to be announced today
- ❖ State-run IRFC looks to raise \$1 billion debt
- ❖ Union Budget paves way for inclusion of Indian bonds in global indices
- ❖ Sebi seeks Franklin Templeton reply after investment markdown in Voda Idea

10-year G-sec yield



Inflation vs. Interest rate



Debt FPI Inflows

Debt Watch	Percent
Call rate	4.94
Repo rate	5.15
10 Yr Gsec par yield	6.82
1-mth CP rate	5.40
3-mth CP rate	5.77
6-mth CP rate	6.18
1 Yr CP rate	6.55
1-mth CD rate	5.13
3-mth CD rate	5.65
6-mth CD rate	5.74
1 Yr CD rate	6.10

Auctions / Money Market Operation		
Date	Description	Amount(Cr)
Feb-06	G-sec auction	--
Feb-06	Total repo (outstanding)	2,939
Feb-06	Total reverse repo (outstanding)	2,32,293
Feb-06	Marginal standing facility (outstanding)	2,820
Feb-06	GOI surplus cash balance with RBI	--

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
05-Feb-20	2386.2	6270.4	(3884.2)
04-Feb-20	1358.5	1155.4	203.2
03-Feb-20	1443.0	1552.6	(109.6)
Total Jan-2020	25926.9	37574.9	(11648.0)
Total Dec-2019	33541.7	38157.9	-4616.3
Total 2019	392458.9	366578.5	25880.4

Debt Fund Benchmark Indices

Market Indices	1 M (%)	1 Yr (%)	3 Yr (%)	5 Yr (%)
Crisil Composite Bond Fund Index	1.04	12.65	7.09	8.48
Crisil Short Term Bond Fund Index	0.96	10.38	7.49	8.18
Crisil ST Debt Hybrid 75+25 Index	0.68	10.88	8.68	8.47
Crisil Liquid Fund Index	0.46	6.67	7.00	7.31

Macro

- ❖ Services sector activity rises to 7-year high of 55.5 in January
- ❖ Customs duty hike impacts imports worth \$8.9 billion
- ❖ Govt mulls setting up expert committee to fix new poverty line
- ❖ Over 5 crore farmers yet to get 3rd instalment of PM-Kisan scheme: Govt data

	Q2 FY2020(%)	Q1 FY2020(%)	Q2 FY2019(%)
GDP growth	4.5	5.01	7.00

Commodity Prices				
	Current	Week ago	Month ago	Year ago
Brent crude(\$/bbl)	55.48	59.81	69.46	61.98
Gold (RS/10 gms)	40,059	40,312	40,678	33,239

	Dec-2019 (%)	Nov-2019 (%)	Year ago (%) (Dec-2018)
CPI	7.35	5.54	2.11
WPI	2.59	0.58	3.46
Core Sector Output	1.30	-1.50	2.10

Global market trends

- ❖ China market rises on stimulus hopes
- ❖ US trade deficit narrows in 2019 for the first time in six years
- ❖ China export, imports may fall due to virus fears
- ❖ Airbus closes China plant due to corona virus
- ❖ Oil jumps after declining for 5 days

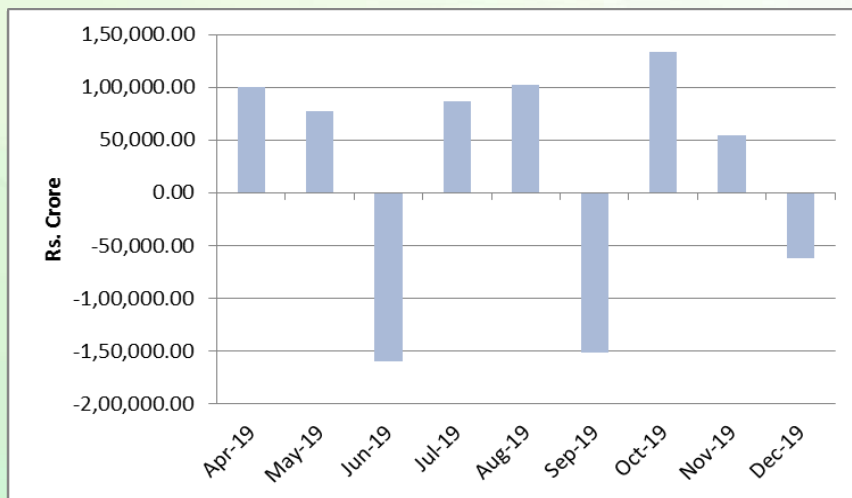
INR vs Global currency		
	Current	Prev close
USD	71.26	71.23
GBP	92.54	92.55
Euro	78.37	78.76
Yen	0.65	0.66
Yuan	10.23	10.17

Global equity benchmark indices returns(%)				
Benchmark	1 Day	1 Week	1 Month	1 Year
FTSE 100	0.57	-0.02	-1.84	4.25
Hang Seng	--	-1.78	-6.24	-4.70
Nikkei 225	--	-1.26	--	10.75
S&P 500	1.13	1.87	3.09	21.81
Shanghai Composite	--	--	-9.74	--

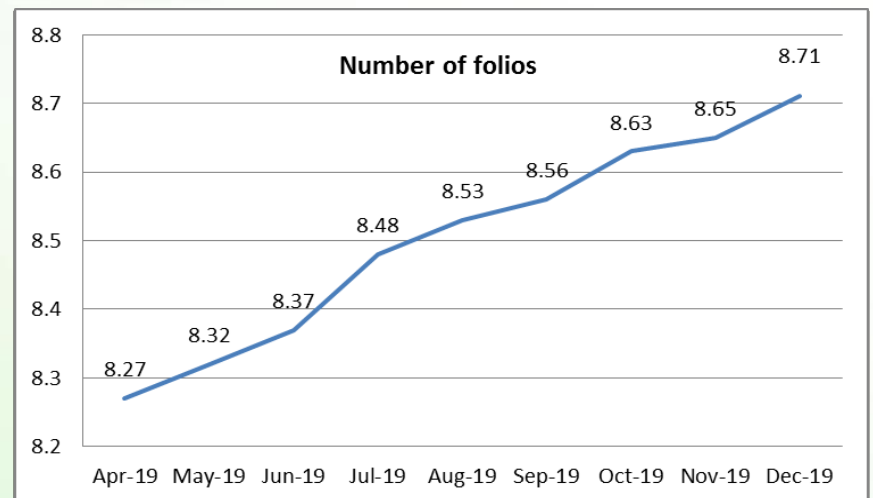
Mutual Fund Roundup

- ❖ Debt fund managers, traders to seek clarity from RBI on Operation Twist
- ❖ SEBI may reclassify mid cap, small cap mutual fund to offer more flexibility
- ❖ AMFI seeks clarification regarding dividend distribution tax on mutual funds
- ❖ SEBI plans to amend investment manager eligibility norms for InvITs

Mutual fund inflows



Mutual fund folio growth



(Data source: NSE, NSDL, FIMMDA, investing.com, tradingeconomics.com, fx-rate.net, ACEMF, AMFI, RBI, equitymaster.com)

(News source: Economic Times, Business Standard)

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