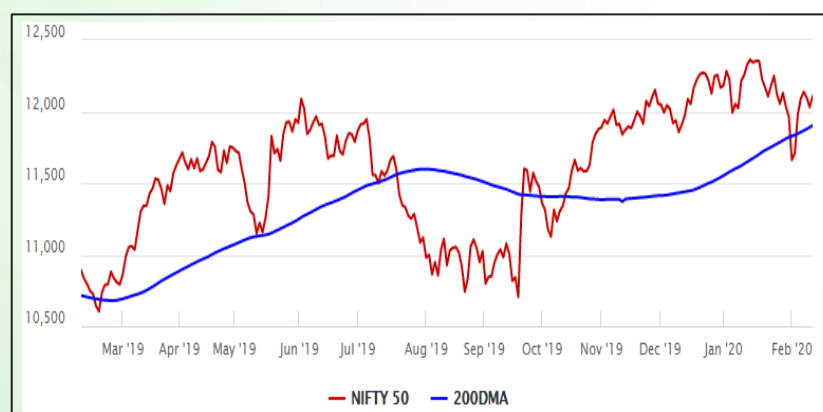


Equity Market

- ❖ Sensex rises 237 points to close at 41,216
- ❖ India out of US' developing nations list for trade sops
- ❖ Nifty P/E at 27.21, Nifty Midcap 100 P/E at 26.20

S&P CNX Nifty - 200 DMA



Nifty Equity Benchmark Indices

| Index | Current Value | %chg | 52 wkhigh | 52 wklow |
|---------------------|---------------|-------|-----------|----------|
| Nifty 50 | 12107.9 | 0.63 | 12430.5 | 10585.6 |
| Nifty Mid cap 100 | 18206.2 | 0.08 | 18495.9 | 14975.8 |
| Nifty Small cap 100 | 6190.8 | 0.21 | 6822.5 | 5114.6 |
| Bank | 31300.6 | 0.78 | 32613.1 | 26560.6 |
| Auto | 7892.4 | 0.41 | 9059.4 | 6727.6 |
| FMCG | 30414.6 | -0.37 | 32644.9 | 28099.2 |
| Pharma | 8324.7 | 0.77 | 9578.4 | 7047.1 |
| Realty | 317.8 | 0.22 | 336.4 | 220.6 |

Factors driving the market

- ❖ Markets cheer as infection rate of coronavirus slows down
- ❖ Cochin Shipyard Q3 net profit rises
- ❖ Coal India, Hexaware, M&M Q3 net profit slips; IDBI Bank, Allahabad Bank net loss widens

Nifty Top Gainers/Losers

| Index | Value | 52 wkhigh | 52 wklow |
|--------------------|-------|-----------|----------|
| Top Gainers | | | |
| GAIL | 129.0 | 183.3 | 110.5 |
| JSW Steel | 288.7 | 314.0 | 201.8 |
| Bharti Infratel | 248.0 | 333.5 | 176.4 |
| Top Losers | | | |
| Yes Bank | 36.8 | 286.0 | 29.0 |
| BPCL | 481.2 | 549.0 | 308.4 |
| M&M | 523.9 | 704.2 | 502.6 |

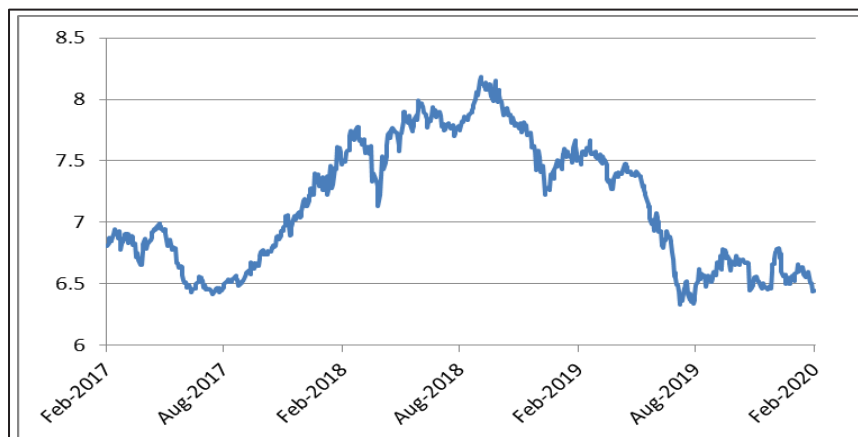
Equity FPI Inflows

| Date | Rs Crore | | |
|----------------|-----------------|-------------|-----------------|
| | Gross Purchases | Gross Sales | Net Investments |
| 11-Feb-20 | 4613.5 | 5116.3 | (502.9) |
| 10-Feb-20 | 15023.0 | 5079.3 | 9943.7 |
| 07-Feb-20 | 6676.7 | 6777.6 | (101.0) |
| 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 |

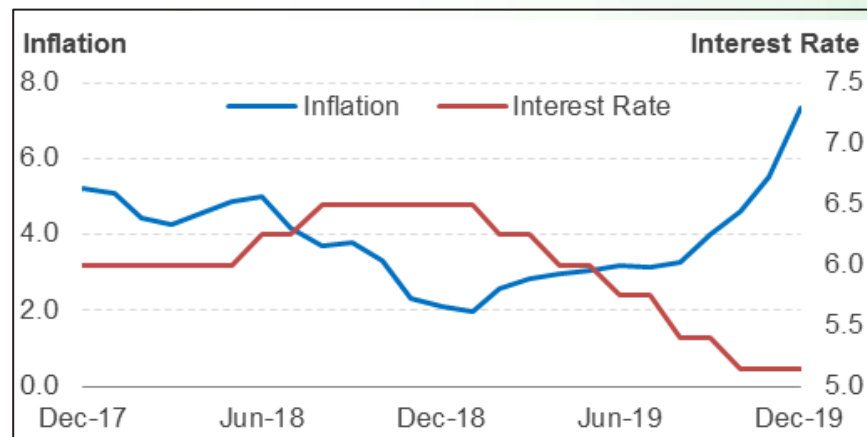
Debt Market

- ❖ CPI data for January, IIP data for December to be out today
- ❖ Moody's lowers IndusInd Bank's outlook to 'negative'
- ❖ Government seeks additional 270 days for IL&FS resolution
- ❖ Government proposal on DDT to adversely impact fund raising plans of NHA, PowerGrid

10-year G-sec yield



Inflation vs. Interest rate



Debt FPI Inflows

| Debt Watch | Percent |
|------------------|---------|
| Call rate | 4.93 |
| Repo rate | 5.15 |
| 10 Yr Gsec yield | 6.47 |
| 1-mth CP rate | 5.31 |
| 3-mth CP rate | 5.85 |
| 6-mth CP rate | 6.18 |
| 1 Yr CP rate | 6.55 |
| 1-mth CD rate | 5.11 |
| 3-mth CD rate | 5.52 |
| 6-mth CD rate | 5.65 |
| 1 Yr CD rate | 6.10 |

| Auctions / Money Market Operation | | |
|-----------------------------------|--|------------|
| Date | Description | Amount(Cr) |
| Feb-12 | G-sec auction | -- |
| Feb-12 | Total repo (outstanding) | 2,150 |
| Feb-12 | Total reverse repo (outstanding) | 1,93,493 |
| Feb-12 | Marginal standing facility (outstanding) | 1,530 |
| Feb-12 | GOI surplus cash balance with RBI | -- |

| Date | Rs Crore | | |
|----------------|-----------------|-------------|-----------------|
| | Gross Purchases | Gross Sales | Net Investments |
| 11-Feb-20 | 4828.3 | 2679.3 | 2470.2 |
| 10-Feb-20 | 6060.1 | 2383.6 | 3676.5 |
| 07-Feb-20 | 7820.1 | 1997.3 | 5822.8 |
| 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 | 2.10 | 12.98 | 8.07 | 8.67 |
| Crisil Short Term Bond Fund Index | 1.51 | 10.65 | 7.94 | 8.32 |
| Crisil ST Debt Hybrid 75+25 Index | 1.10 | 11.34 | 8.98 | 8.63 |
| Crisil Liquid Fund Index | 0.48 | 6.63 | 7.00 | 7.30 |

Macro

- ❖ Rabi Cereals production for 2019-20 to increase by 4.52 %, Sugar unlikely to see big revision
- ❖ India Inc's foreign investment jumps 40% to USD 2.10 billion in January
- ❖ Economy not in trouble; green shoots visible: FM Sitharaman
- ❖ Cotton, yarn, rajma trade with China comes to a halt
- ❖ RBI Plans To Set Up New Retail Payment System

| | 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) | 54.01 | 53.96 | 64.84 | 61.51 |
| Gold (RS/10 gms) | 40,468 | 40,471 | 39,602 | 32,913 |

| | 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

- ❖ UK economy flat in fourth quarter of 2019
- ❖ US Fed Reserve Chair Jerome Powell concerned that coronavirus outbreak could disrupt the global economy
- ❖ US Fed says its current target range for short-term borrowing costs, between 1.50% and 1.75% is appropriate
- ❖ US stocks close at fresh high, Asian markets rise too
- ❖ EU set for trade talks with UK, seeks a unique and unprecedented deal

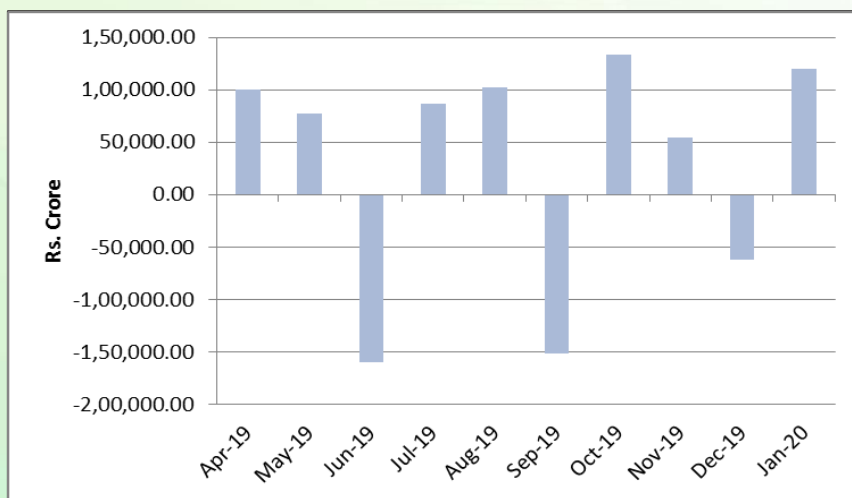
| INR vs Global currency | | |
|------------------------|---------|------------|
| | Current | Prev close |
| USD | 71.20 | 71.24 |
| GBP | 92.28 | 92.00 |
| Euro | 77.72 | 77.75 |
| Yen | 0.65 | 0.65 |
| Yuan | 10.23 | 10.21 |

| Global equity benchmark indices returns(%) | | | | |
|--|-------|--------|---------|--------|
| Benchmark | 1 Day | 1 Week | 1 Month | 1 Year |
| FTSE 100 | 0.71 | 0.80 | -1.17 | 5.19 |
| Hang Seng | -- | 2.12 | -4.88 | -3.21 |
| Nikkei 225 | -- | 2.61 | -0.69 | 16.49 |
| S&P 500 | 0.17 | 1.82 | 2.83 | 23.91 |
| Shanghai Composite | -- | 3.85 | -6.53 | -- |

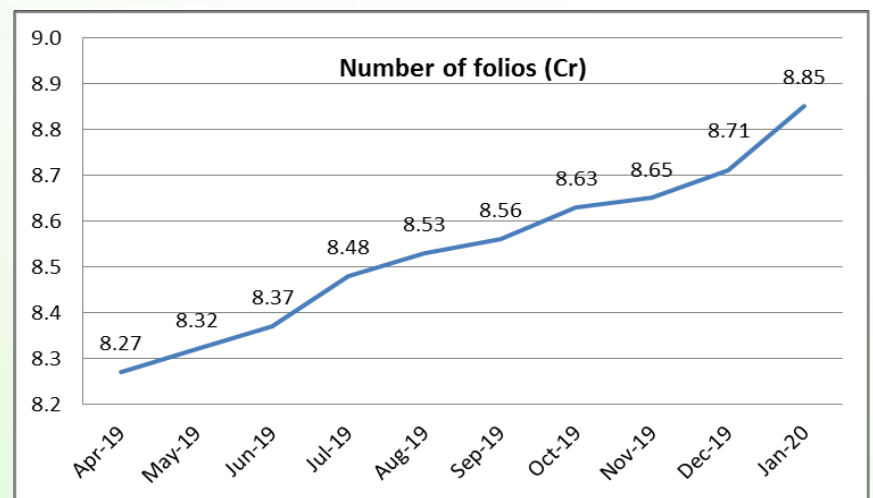
Mutual Fund Roundup

- ❖ SEBI may relax 'restrictive' norms on MF investments in small/mid-cap stocks
- ❖ SIP inflows in January scales new high of Rs 8,532 Crore
- ❖ AMFI CEO NS Venkatesh sees mutual fund AUM growing 15-20% in FY2021
- ❖ Demand for ELSS may not taper off after the new tax regime: NS Venkatesh

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.