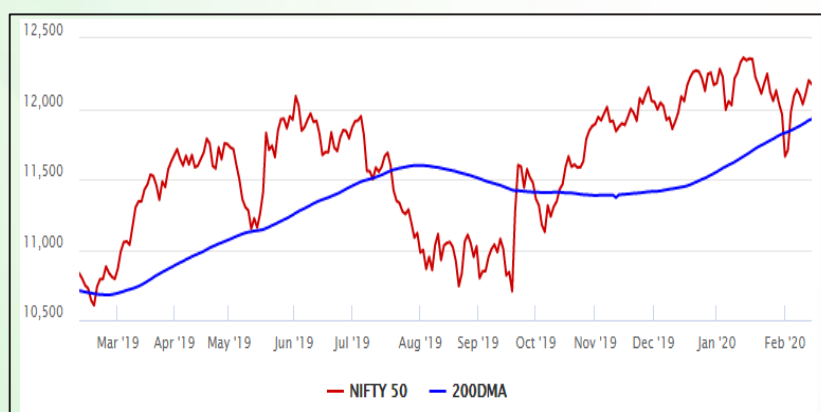


Equity Market

- ❖ Sensex drops 106 points to close at 41,460
- ❖ Weak industrial production data and rising inflation kept market mood sombre
- ❖ Nifty P/E at 27.59, Nifty Midcap 100 P/E at 26.37

S&P CNX Nifty - 200 DMA



Nifty Equity Benchmark Indices

Index	Current Value	%chg	52 wkhigh	52 wklow
Nifty 50	12174.7	-0.22	12430.5	10585.6
Nifty Mid cap 100	18125.0	-0.24	18495.9	14975.8
Nifty Small cap 100	6175.3	-0.02	6822.5	5114.6
Bank	31230.3	-0.83	32613.1	26560.6
Auto	7914.9	-0.24	9059.4	6727.6
FMCG	31039.3	0.17	32644.9	28099.2
Pharma	8335.7	0.85	9578.4	7047.1
Realty	313.8	-0.44	336.4	220.6

Factors driving the market

- ❖ Yes Bank shares jump on fund raising plans
- ❖ BPCL Q3 profit triples; Nestle India, Air India Express, Apollo Hospitals Q3 net profit surges
- ❖ Vodafone Idea Q3 net loss widens to Rs 6,438 Crore, Future Retail net profit down

Nifty Top Gainers/Losers

Index	Value	52 wkhigh	52 wklow
Top Gainers			
Yes Bank	37.5	286.0	29.0
Dr Reddy's Lab	3322.0	3336.9	1873.0
ZEEL	238.0	489.0	199.2
Top Losers			
IndusInd Bank	1231.9	1834.4	1188.1
Tata Steel	440.0	561.7	320.4
NTPC	114.8	145.9	106.7

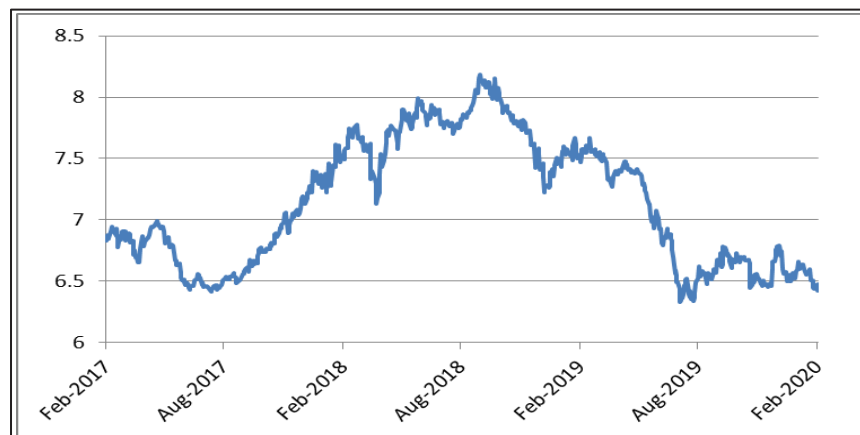
Equity FPI Inflows

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
13-Feb-20	4949.6	5612.6	(663.0)
12-Feb-20	7201.6	5044.2	2157.4
11-Feb-20	4613.5	5116.3	(502.9)
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

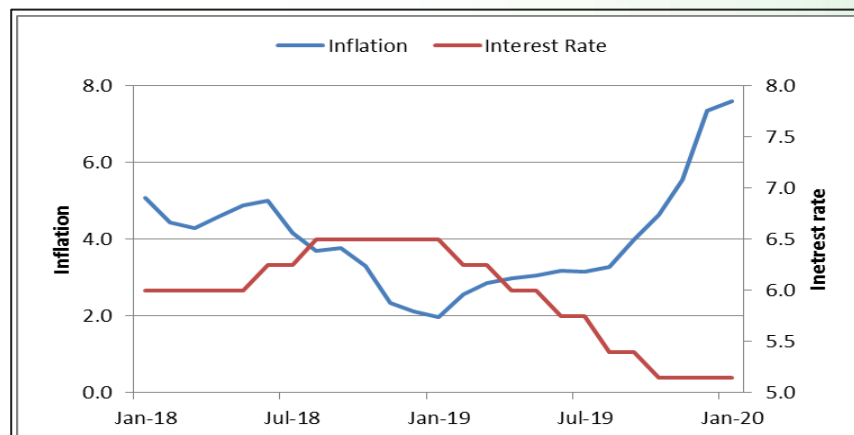
Debt Market

- ❖ SEBI directs CARE Ratings to sack Chairman SB Mainak over irregularities in IL&FS case
- ❖ India Ratings maintains negative outlook on real estate
- ❖ Long-term reverse repos to have fixed interest rate: RBI
- ❖ IMF sounds alert over India's rising debt

10-year G-sec yield



Inflation vs. Interest rate



Debt FPI Inflows

Debt Watch	Percent
Call rate	4.90
Repo rate	5.15
10 Yr Gsec yield	6.43
1-mth CP rate	5.33
3-mth CP rate	5.85
6-mth CP rate	6.18
1 Yr CP rate	6.55
1-mth CD rate	5.10
3-mth CD rate	5.55
6-mth CD rate	5.65
1 Yr CD rate	6.10

Auctions / Money Market Operation		
Date	Description	Amount(Cr)
Feb-14	G-sec auction	--
Feb-14	Total repo (outstanding)	3,895
Feb-14	Total reverse repo (outstanding)	1,95,640
Feb-14	Marginal standing facility (outstanding)	4,080
Feb-14	GOI surplus cash balance with RBI	--

Date	Rs Crore		
	Gross Purchases	Gross Sales	Net Investments
13-Feb-20	963.3	1706.6	(743.2)
12-Feb-20	1506.7	1417.7	89.0
11-Feb-20	4828.3	2679.3	2470.2
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	2.36	12.96	8.15	8.69
Crisil Short Term Bond Fund Index	1.54	10.50	7.95	8.33
Crisil ST Debt Hybrid 75+25 Index	1.06	11.60	9.02	8.54
Crisil Liquid Fund Index	0.48	6.63	7.00	7.30

Macro

- ❖ S&P affirms India's rating at 'BBB-', says fiscal position remains precarious
- ❖ Piyush Goyal asks e-commerce players to strictly adhere to FDI norms
- ❖ Focusing on sectors with competitive edge to boost exports: Goyal
- ❖ Tunnel works worth over Rs 1 trillion to be undertaken in next 5 years: Gadkari
- ❖ GST compensation to states delayed due to low realisation of cess: FM

	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)	56.34	54.93	64.23	63.61
Gold (RS/10 gms)	40,619	40,556	39,602	37,691

	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

- ❖ US gives Iraq sanctions waiver for vital Iranian gas imports
- ❖ US inflation rises 0.1% in January, lower energy prices restrained overall inflation growth
- ❖ China Market drops after spike in virus death cases, Asian markets dip
- ❖ Oil prices rise for three consecutive session

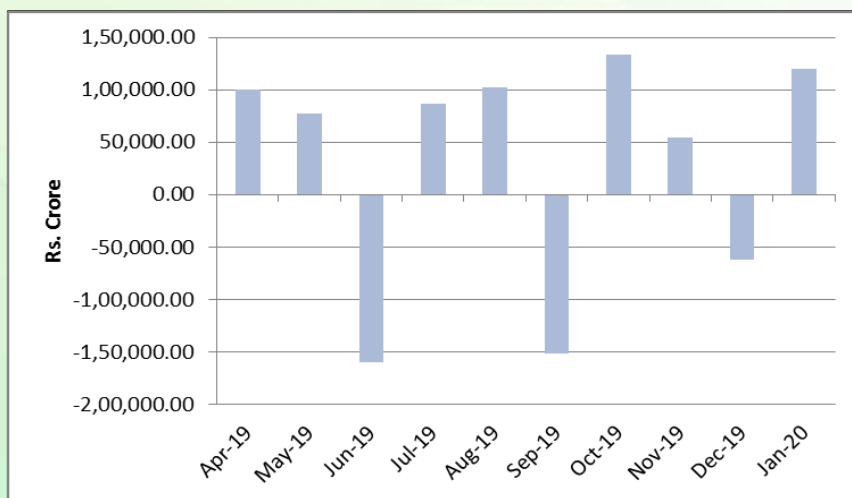
INR vs Global currency		
	Current	Prev close
USD	71.30	71.33
GBP	92.99	92.45
Euro	77.23	77.53
Yen	0.65	0.65
Yuan	10.22	10.22

Global equity benchmark indices returns(%)				
Benchmark	1 Day	1 Week	1 Month	1 Year
FTSE 100	-1.09	-0.70	-2.17	3.63
Hang Seng	-0.34	0.86	-4.23	-2.69
Nikkei 225	-0.14	-0.19	-0.10	12.69
S&P 500	-0.16	0.84	2.61	22.55
Shanghai Composite	--	2.11	-6.06	7.56

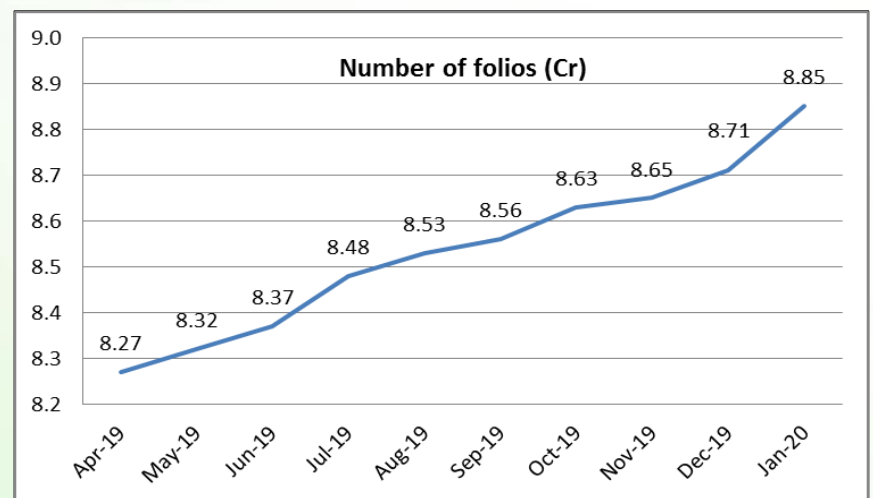
Mutual Fund Roundup

- ❖ SBI MF becomes MF with highest asset under management, ahead of HDFC MF
- ❖ SEBI to hire agencies to conduct digital survey of investors' behaviour and investment pattern
- ❖ SEBI directs NSE to divest entire 37% stake in CAMS
- ❖ Gold ETFs see inflow of Rs 200 Crore in January, highest in seven years

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)