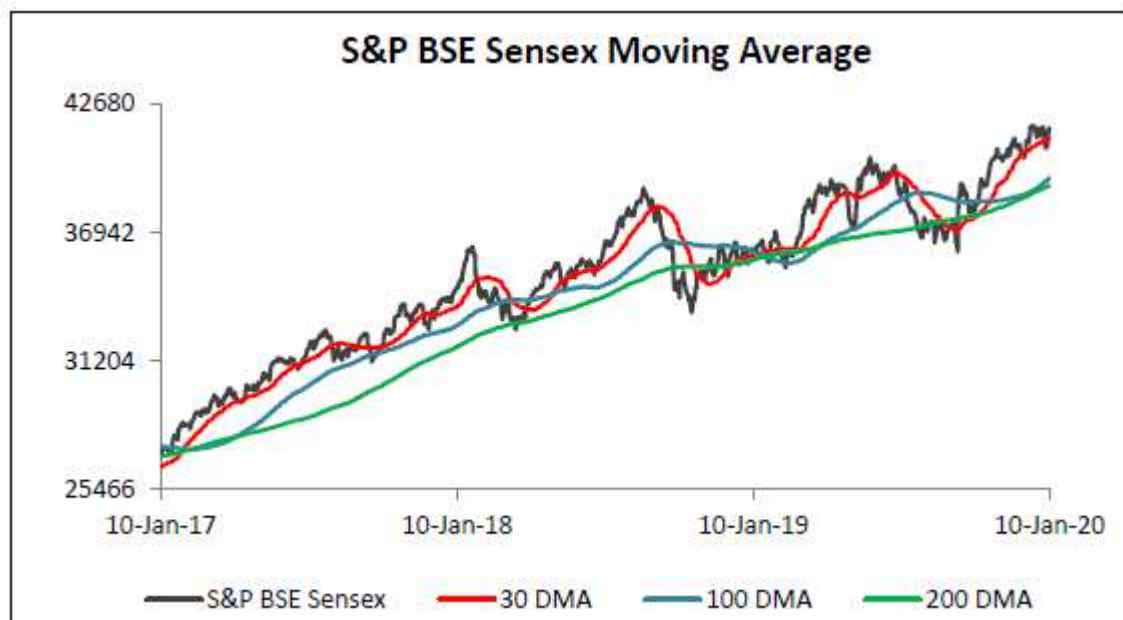


## Sensex, Nifty scale fresh high

Benchmark indices were trading over half a per cent higher after scaling fresh all-time highs.

At 10:30 AM, the S&P BSE Sensex was trading at 41,874, up 274 points or 0.7%. Market breadth are positive and out of a total of 1,999 shares traded on the Bombay Stock Exchange, 1,323 advanced while 546 declined and 130 remained unchanged. The Nifty50 was up 77 points or 0.6% at 12,333.

10-year Indian G-Sec yields were trading at 6.595 in morning against the previous close of 6.585.



### **THE WEEK THAT WAS**

Key indices ended with small gains amid high volatility. After sliding sharply on Monday, local indices staged a comeback on easing of US-Iran tensions and positive global stocks. The Nifty scaled a fresh record high in intraday trade on Friday.

In the week ended on Friday, January 10, 2020, the Sensex rose 135.11 points or 0.33% to settle at 41,599.72. The Nifty 50 index rose 30.15 points or 0.25% to settle at 12,256.80. The Nifty scaled a record high of 12,311.20 in intraday trade on Friday.

Indian Indices	Px Last	Change in %		52 Week		PE
		1 Day	1 Month	High	Low	
S&P BSE Sensex	41600	0.36	3.38	41810	35287	26.32
Nifty 50	12257	0.33	3.37	12311	10584	28.51
S&P BSE Midcap	15159	0.40	4.40	15662	12915	28.64
S&P BSE 100	12335	0.33	3.67	12389	10723	26.13
S&P BSE 200	5122	0.34	3.71	5145	4432	28.57
Nifty Midcap 100	17386	0.39	5.29	18463	15134	25.36
Nifty 500	9978	0.34	3.99	10023	8706	31.18

## GLOBAL MARKETS

Asian shares rose to new 19-month highs on Monday ahead of the expected signing on a Phase 1 China-US trade deal, although markets have yet to see the details of the agreement.

MSCI's broadest index of Asia-Pacific shares outside Japan was 0.47% higher, touching its highest point since June 2018. Japanese markets were closed for a holiday.

South Korea's trade-sensitive Kospi added 0.73% and Hong Kong's Hang Seng was up 0.74%, while Taiwan shares added 0.6% in the first trading day after Taiwanese re-elected President Tsai Ing-wen by a landslide on Saturday.

The benchmark Shanghai Composite Index ended the morning session up just 0.06%.

Wall Street slipped and bonds rallied on Friday when data showed U.S. nonfarm payrolls missed forecasts with a rise of 145,000, while wages and hours worked were soft.

Global Indices	Px Last	Change in %		52 Week		PE
		1 Day	1 Month	High	Low	
Russell 1000	1804	-0.27	4.23	1814	1423	20.60
Russell 3000	1460	-0.19	5.98	1468	1095	21.15
Nasdaq	9179	-0.27	6.53	9235	6887	27.39
FTSE 100	7588	-0.14	5.19	7727	6734	15.93
CAC 40	6037	-0.09	3.23	6072	4731	19.88
DAX	13483	-0.09	3.16	13548	10787	18.05
Nikkei	23851	0.47	1.88	24091	20111	18.75
Hang Seng	28638	0.27	8.33	30280	24900	11.49
Shanghai Comp.	3092	-0.08	6.00	3288	2532	12.29

## INDIAN RUPEE

The Indian rupee on Monday hit a one-month high against the US dollar tracking gains in Asian peers amid optimism that the phase one trade deal between the US and China will be signed this week.

In early deals today, the rupee traded at 70.84 a dollar, up from Friday's close of 70.94. The Indian unit had opened and touched a high of 70.79 -- a level last seen on 16 December. This was the fifth consecutive session when the currency traded higher.

## CRUDE OIL

Oil prices were slightly firmer after suffering the first weekly loss since late November. Brent crude futures were up 6 cents at \$65.04 a barrel, while U.S. crude added 10 cents to \$59.14 a barrel.

## WEEK AHEAD

Results of India Inc for the quarter ended December 2019 will be in focus this week. Besides, macroeconomic data, trend in global markets, the movement of rupee against the dollar and crude oil price movement, inflows from foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will also be closely watched.

On the macro front, India's inflation rate for December (YoY) will be unveiled on today. WPI (Manufacturing) and WPI inflation for December (YoY) will be released tomorrow.

Globally, the US will reportedly sign the first phase of a pending trade deal with China probably on January 15, 2020, marking a pause in the nearly two-year trade war between the two sides.

China will announce GDP growth rate on Friday. China will also announce industrial production data for December on the same day.

US will announce Inflation Rate for December (YoY) and Core Inflation Rate (MoM) tomorrow. US will announce Retail Sales, Initial Jobless Claims and Continuing Jobless Claims on Thursday.

In Europe, European Central Bank monetary policy meeting will be held on Thursday. The Euro Area will announce inflation rate and core inflation rate on Friday.

Fund Flow		Amount in Rs. Crore		
Nature	Gross Pur.	Gross Sale	Net	YTD
<b>FIs</b>				
Equity	5291.23	5134.72	156.51	-43.07
Debt	2048.46	1951.80	96.66	-7010.74
<b>MF<sup>1</sup></b>				
Equity	3894.19	2835.24	1058.95	1626.61
Debt	5905.77	5008.09	897.68	13170.68

1 As on 8th January 2020

**Source:** Reuters, Capital Market, Internal

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

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