

Indices	Value	Pts	Chg (%)
SENSEX	50614.3	358.5	0.71
NIFTY	14895.7	105.7	0.71
SGX NIFTY*	14975.0	79.5	0.53
DOW Jones	31055.9	332.3	1.08
S&P	3871.7	41.6	1.09
Nasdaq	13777.7	167.2	1.23
FTSE	6503.7	(4.1)	-0.06
CAC	5608.5	45.5	0.82
DAX	14060.3	126.7	0.91
Shanghai Composite*	5526.0	52.1	0.95
Nikkei*	28707.5	365.5	1.29
Hang Seng*	29442.8	329.3	1.13

*As at 8.00 am

Most Active Call & Put			
Symbol	Strike Price	OI (000)	Chg (%)
NIFTY	15000CE	62054	-0.2
NIFTY	14700PE	49335	32.1

Commodity	Price	Pts	Chg (%)
NYMEX Crude (USD)	56.8	0.5	0.9
Brent Crude (USD)	59.4	0.5	0.9
Gold (USD)	1796.2	5.0	0.3
Silver (USD)	26.39	0.15	0.58
Copper (USD)	356.55	1.25	0.35
Cotton (USD)	84.48	0.2	0.24

Currency	Value	Pts	Chg (%)
USD/Rupee	72.98	0.01	0.02
Euro/Rupee	87.36	0.04	0.05
Pound/Rupee	99.83	0.12	0.12
USD/Euro	1.20	0.00	0.00
Dollar Index	91.51	-0.02	-0.02

Indicators	Value	Pts	Chg (%)
CBOE VIX	21.8	-1.1	-5.0
India VIX	23.1	-0.6	-2.6

Indicators	Value	Bps chg
India 10-Yr Yield	6.07	-1.0
US 10-Yr Yield	1.13	-1.0

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	6544	90288	8455619
Advance (Nos)	18	28	NA
Declines (Nos)	12	22	NA
Unchanged	0	0	NA

Market Summary

The euphoria in the stock market that drove benchmark indices to record high on Thursday is likely to continue well into Friday's session wherein the benchmark Nifty50 index could make a dash for the 15,000 mark amid indications of a firm start. Nifty futures on the Singapore Exchange traded 80 points higher at 14,975 around 8.00 am.

While the global market mood remains strong which is likely to drive the bulls on D-Street higher, what remains to be seen if the Reserve Bank of India's monetary policy outcome would contribute to the party on bourses. The majority expect status quo on interest rates by the RBI MPC but the commentary on inflation and economic outlook would hold importance.

Meanwhile, on the global market front, US stocks rose more than 1% in the overnight session and the S&P 500 and Nasdaq posted record closing highs after another batch of upbeat earnings and data suggesting the labour market may be stabilizing. Meanwhile, investor hopes of further progress on a pandemic-relief package also boosted the market. The Dow Jones Industrial Average rose 1.08%, the S&P 500 gained 1.09% and the Nasdaq Composite added 1.23%. Consequently, most Asian stocks also pushed higher. Japan's Topix Index rose 0.9%, Hong Kong's Hang Seng gained 0.8%, South Korea's Kospi index added 0.1% and Australia's S&P/ASX 200 Index gained 0.8%.

Britannia Industries, Mahindra & Mahindra, Punjab National Bank, Mrs Bectors Food, Fortis Healthcare, Pfizer and Shipping Corporation of India are among 127 companies that are scheduled to release their December quarter numbers today.

Macro News

Disinvestment calendar will work well, non-tax revenues to improve: FM

Finance Minister Nirmala Sitharaman on Thursday exuded confidence that the disinvestment calendar announced in the Union Budget will "work well". Addressing members of industry chamber Ficci, she said the three large areas where the big-ticket expenditure will happen are infrastructure, health and agriculture. The budget has pegged disinvestment receipts for the 2021-22 fiscal beginning April 1 at Rs 1.75 lakh crore. The government is targeting to conclude strategic sale of BPCL, Air India, Shipping Corporation of India, Container Corporation of India, IDBI Bank, BEML, Pawan Hans, Neelachal Ispat Nigam Ltd, in the next fiscal.

Petrol, diesel price at fresh high; oil co says tax cut by govt can help

Petrol and diesel prices on Thursday climbed to fresh highs in the country as rates were hiked by the most in recent times, even as fuel retailers said the government can cut taxes to ease consumer burden. Petrol and diesel price was hiked by 35 paise per litre each after a gap of a week, according to price notification of state-owned fuel retailers. The increase took petrol prices to a fresh high of Rs 86.65 a litre in Delhi and to Rs 93.20 in Mumbai. Diesel rates touched Rs 76.83 in Mumbai and an all-time high of Rs 83.67.

Digital advertising to grow 20% in 2021, touch Rs 23,700 cr by 2022: Dentsu

The Covid-19 pandemic has accelerated the adoption of digital, forcing marketers to increase advertising spends on the medium. A just-released report by advertising group Dentsu says that the digital medium grew by 15.3 per cent in calendar year 2020 to reach Rs 15,782 crore in size. Market growth would touch 20 per cent in 2021, led by increased digital activity, taking market size to Rs 18,938. By 2022, the digital medium is estimated to touch Rs 23,673 crore in size, constituting nearly a quarter of the overall advertising market.

Institutional Activity	Cash	
	04-Feb-21	03-Feb-21
FII (INR Crs)		
Buy	11826.54	11546.18
Sell	9889.80	9025.26
Net	1936.74	2520.92
DII (INR Crs)		
Buy	6314.21	6427.49
Sell	7082.76	6827.23
Net	(768.55)	(399.74)

FII Derivative Statistics			
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)
INDEX FUTURES	4427.50	4496.29	114742
INDEX OPTIONS	528217.90	530300.42	1001335
STOCK FUTURES	15601.12	16459.00	1183788
STOCK OPTIONS	11671.25	11888.99	125097
Total	559917.77	563144.70	

Gainers & Losers	Price	Chg (%)
Gainers (INR)		
SBIN	357.95	6.55
ITC	230.05	6.14
BAJFINANCE	5505.00	4.96
SHREECEM	27250.00	4.83
ONGC	97.80	4.77
Losers (INR)		
ASIANPAINT	2406.00	-1.94
UPL	548.90	-1.67
CIPLA	835.25	-1.65
INDUSINDBK	1031.95	-1.58
BHARTIARTL	599.80	-1.49

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	19148.74	229.27	1.21
S&P BSE Mid-Cap	19594.94	280.70	1.45
S&P BSE Auto	24531.53	274.19	1.13
S&P BSE BANKEX	39941.18	631.08	1.61
S&P BSE Capital Goods	21817.77	337.10	1.57
S&P BSE FMCG	12718.46	281.46	2.26
S&P BSE Healthcare	21631.27	62.99	0.29
S&P BSE IT	25656.34	-69.26	-0.27
S&P BSE Metals	12236.38	237.20	1.98
S&P Oil & Gas	14761.82	190.93	1.31

Key News

Arvind Ltd Q3 net down 30% to Rs 25 cr, textile business rebounds

Textile and branded apparel player Arvind Ltd has posted a 30 per cent dip in consolidated net profit, to Rs 24.91 crore for the third quarter ended December 31, 2020, from Rs 35.77 crore in the said quarter last year. The company's consolidated revenue from operations dipped nearly 19 per cent year-on-year in the quarter to Rs 1,514 crore, from Rs 1,869 crore in the corresponding period last year. Sequentially, however, the company's consolidated revenue from operations rose 16 per cent in Q3 from Rs 1,305 crore in the second quarter ended September 30, 2020.

SBI Q3 net down 6.93% at Rs 5,196 cr, asset quality improves despite Covid

The country's largest lender, State Bank of India, saw its net profit fall by 6.93 per cent to Rs 5,196 crore in the December quarter of financial year 2020-21 (Q3FY21) from Rs 5,583 crore in the corresponding quarter last year. The dip was a result of a surge in interest income in Q3FY20 because of a one-time recovery in Essar Steel account of Rs 4,039 crore. Its asset quality profile improved even if one accounts for the impact when the Supreme Court vacates the interim stay on recognising non-performing assets (NPAs). The pro-forma gross NPAs were 5.44 per cent in Q3, compared with 5.88 per cent in Q2, and 6.94 per cent a year ago. Net NPAs were 1.82 per cent in Q3, against 2.08 per cent in Q2, and 2.65 a year ago.

NTPC Q3 net profit up 10% to Rs 3,315 crore, to pay interim dividend

State-owned power generation major NTPC Limited posted a 10 per cent rise in net profit for the quarter ended December 2020. Profit after tax (PAT) for Q3FY21 was Rs 3,315.34 crore, as against Rs 2,995.14 crore in the corresponding quarter of the previous year. The total income of the company during the quarter was Rs 25,268.56 crore as against Rs 24,022.62 crore in Q3 FY20, registering an increase of 5.19 per cent. The gross power generation of NTPC in Q3 FY21 was 65.42 billion units as against 61.21 Billion units during the corresponding period of previous year.

Minda Industries posts over two-fold jump in Q3 profit at Rs 121 cr

Auto components maker Minda Industries on Thursday reported an over two-fold jump in consolidated profit after tax at Rs 121 crore in the third quarter ended December 2020, riding on the continued growth momentum in the automobile industry fuelled by strong demand. The company, the flagship firm of the Uno Minda Group, had posted a consolidated profit after tax of Rs 53 crore in the same period last fiscal, Minda Industries said in a statement.

Icra consolidated net profit rises 8.6% to Rs 24.45 cr in December quarter

Ratings firm Icra on Thursday reported an 8.6 per cent rise in its consolidated net profit to Rs 24.45 crore in the third quarter ended December 2020. It had posted a net profit of Rs 22.52 crore during the same quarter a year ago. The consolidated total income in the quarter fell to Rs 88.74 crore as against Rs 91.03 crore in the same period previous fiscal, Icra said in a regulatory filing.

HPCL's consolidated net profit doubles to Rs 2,373.71 crore in Q3

Consolidated net profit of Hindustan Petroleum Corporation (HPCL) for the third quarter of 2020-2021 doubled to Rs 2,373.71 crore from Rs 1,027.23 crore in the year-ago period. The higher profit is on account of inventory, exchange gains, and higher sales. The public sector oil and gas company's consolidated total income increased to Rs 78,324.98 crore, up from Rs 75,048.60 crore in the same quarter of FY20.



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