

Indices	Value	Pts	Chg (%)
SENSEX	51324.69	(379.14)	-0.73
NIFTY	15118.95	(89.95)	-0.59
SGX NIFTY*	15048.00	(67.00)	-0.44
DOW Jones	31493.34	(119.68)	-0.38
S&P	3913.97	(17.36)	-0.44
Nasdaq	13865.36	(100.14)	-0.72
FTSE	6617.15	(93.75)	-1.40
CAC	5728.33	(37.51)	-0.65
DAX	13886.93	(22.34)	-0.16
Shanghai Composite*	3640.99	(34.37)	-0.94
Nikkei*	29947.42	(288.67)	-0.95
Hang Seng*	30209.88	(385.39)	-1.26

*As at 8.15 am

Most Active Call & Put			
Symbol	Strike Price	OI (000)	Chg (%)
NIFTY	15200CE	42875	-33%
NIFTY	15100PE	49924	74%

Commodity	Price	Pts	Chg (%)
NYMEX Crude (USD)	59.40	-1.12	(1.89)
Brent Crude (USD)	62.98	-0.95	(1.51)
Gold (USD)	1763.50	-11.50	(0.65)

Currency	Value	Pts	Chg (%)
USD/Rupee	72.58	3.44	0.05
Euro/Rupee	87.80	0.01	0.00
Pound/Rupee	101.38	0.01	0.00

Indicators	Value	Pts	Chg (%)
India VIX	21.54	0.03	0.14

Indicators	Value	Bps
India 10-Yr Yield	6.132%	-0.003
US 10-Yr Yield	1.289%	0.002

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	4717	81935	8021078
Advance (Nos)	1624	23	NA
Declines (Nos)	1342	27	NA
Unchanged	159	0	NA

Market Summary

The Indian markets are poised to open Friday's trade on a feeble note, amid subdued global cues. The SGX Nifty was down 67 points at 15,048, at 8.15 AM. Investors may, today, stick to stock-specific trading, while foreign fund flow, the Rupee's trajectory, and oil price movement will also be keenly tracked.

Besides, aviation stocks and telecom stocks will react to their latest monthly air passenger traffic and subscriber data, respectively.

Mahindra CIE Automotive, Asian Tea & Exports & Binani Industries are scheduled to announce their quarterly earnings today.

On Wall Street, the Dow Jones fell 0.38 per cent, the S&P 500 lost 0.44 per cent, and the Nasdaq 0.72 per cent. Asian stocks also pulled back on Friday. Australia's benchmark ASX 200 index and Hong Kong's Hang Seng index dipped over 1 per cent, each, in early trading, while Japan's Nikkei fell 0.9 per cent.

In commodities, Brent crude fell 41 cents, or 0.6 per cent, to settle at \$63.93 a barrel.

Macro News

Air traffic improved by 5.6% in January

Indian airlines flew about 5.6% more domestic passengers in January than in the previous month as travellers turned more confident with the pandemic waning across India.

As many as 7.73 million passengers travelled by air in January, up from 7.33 million in December, data from the Directorate General of Civil Aviation (DGCA) published on Thursday showed. However, this is still 39.50% below the numbers of January 2020.

DGCA has allowed airlines to sell seats up to 80% of an airline's pre-covid capacity on domestic flights since December.

The passenger load factor (PLF) of major scheduled commercial airlines was 64-76% in January, around the same levels recorded in the previous month but way below the 78-91% in the same period of 2020.

In January, IndiGo had a 54.3% market share and 69.3% PLF. It carried 4.20 million passengers. Air India's domestic load factor was at 66.2%, with a market share of 10.3%. The national carrier ferried 797,000 passengers.

Institutional Activity	Cash	
	18-Feb-21	17-Feb-21
FIIs (INR Crs)		
Buy	9726	8499
Sell	8823	7491
Net	903	1008
DII (INR Crs)		
Buy	5282	4441
Sell	6499	5725
Net	-1217	-1283

FII Derivative Statistics			
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)
INDEX FUTURES	4275	4457	120689
INDEX OPTIONS	527632	527593	1098367
STOCK FUTURES	15705	16356	1230510
STOCK OPTIONS	16242	16338	203671
Total	563855	564744	

Gainers & Losers	Price	Chg (%)
Gainers (INR)		
ONGC	110.7	8.3
GAIL	143.1	6.47
BPCL	432.2	4.98
IOC	99	4.21
NTPC	103.4	4.08
Losers (INR)		

Bajaj Finance	5563.35	-2.49
Shree Cements	27623.35	-2.28
Nestle	16364.7	-2.25
M&M	894.45	-2.24
Kotak Mahindra	1945.45	-2.21

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	20016.43	133.14	0.67
S&P BSE Mid-Cap	20375.64	139.01	0.69
S&P BSE Auto	24429.66	-333.33	-1.35
S&P BSE BANKEX	41183.14	-488.37	-1.17
S&P BSE Capital Goods	22093.73	-111.49	-0.50
S&P BSE FMCG	12301.89	-38.93	-0.32
S&P BSE Healthcare	21666.34	-165.50	-0.76
S&P BSE IT	25468.29	127.64	0.50
S&P BSE Metals	13080.03	164.20	1.27
S&P Oil & Gas	15609.10	632.03	4.22

Key News

Ambuja Cements Q4CY2020 result

On a consolidated basis, the company has reported revenue of Rs.7453 crores during the period ended December 31, 2020 as compared to Rs.7126 crores during the period ended December 31, 2019. OPM during the same period rose 200 bps to 18%. The company has posted net profit of Rs.732 crores for the period ended December 31, 2020 as against net profit of Rs.592 crores for the period ended December 31, 2019.

ACC Q4CY2020 result

On a consolidated basis, the company has reported revenue of Rs.4145 crores during the period ended December 31, 2020 as compared to Rs.4060 crores during the period ended December 31, 2019. OPM during the same period rose 100 bps to 14%. The company has posted net profit of Rs.472 crores for the period ended December 31, 2020 as against net profit of Rs.273 crores for the period ended December 31, 2019.

NMDC'S Donimalai Iron Ore Mine Operations Restarted

After obtaining the Lease extension of Donimalai Iron Ore Mine (ML-2396) for 20 years w.e.f. 03.11.2018 from Govt. of Karnataka (GoK) and completing the associated statutory requirements, the said Donimalai Iron Ore Mine was restarted yesterday.

Poly Medicare Limited prices QIP at Rs. 524 per share

The QIP Committee of board of directors of Poly Medicare has approved closure of the QIP yesterday.

The committee approved the issue price for 76,33,587 Equity Shares to be allotted to eligible qualified institutional buyers at a price of Rs. 524 per Equity Share, including a premium of Rs. 519 per Equity Share, which is at a discount of Rs. 26.79 (4.86% to the floor price of Rs. 550.79 per Equity Share).

IndusInd Bank raises Rs. 2021 crores common equity via conversion of warrants issued to the Promoters

IndusInd Bank raised Rs 2021 crores of common equity capital through conversion of preferential warrants issued to the Promoter entities - IndusInd International Holdings Limited (IIHL) and IndusInd Limited (IL). The warrants were issued as an integral part of the merger with Bharat Financial Inclusion Limited in July 2019. The Promoter entities had paid Rs 673 crores at the time of subscription to the warrants and the balance amount of Rs 2021 crores was paid yesterday.

The finance committee of the Bank today approved allotment of 1,57,70,985 shares to the Promoter entities. The warrants are converted at a price of Rs 1,709 per share reflecting a premium of 65% over the closing price on February 17, 2021.

The Bank's already healthy capital adequacy ratios get further bolstered with this infusion from the Promoter entities. The Capital Adequacy Ratio including 9MFY21 profits was at 16.93% as of December 31, 2020 and this will get augmented to approximately 17.68% with this capital inflow.

Earlier in September 2020, the Bank completed preferential issues of equity capital of Rs 3,288 crores and this was subscribed by the Promoter as well. Together with the current warrants conversion, the Bank has raised Rs 5,309 crores of equity capital during the financial year 2020-21.

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SPA Securities Ltd: Mittal Court, A-Wing, 10th Floor, Nariman Point, Mumbai - 400 021, Tel. No. : +91-022-4289 5600, Fax: +91 (22) 2657 3708/9

SPA GLOBAL PRIVATE LIMITED
Mutual Fund Advisor
AMFI Reg. No. 90796

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