



04 Oct.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,701	1.0 %	19.1 %
BSE SENSEX	58,766	(0.6) %	18.7 %
CNX BANK	37,575	0.9 %	11.0 %
CNX MIDCAP	30,752	1.2 %	27.5 %
CNX SMALLCAP	11,064	1.5 %	33.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,326	1.4 %	12.2 %
S&P 500	4,357	1.2 %	16.0 %
FTSE 100	7,027	(0.8) %	6.9 %
HANG SENG	24,576	(0.4) %	(10.5) %
NIKKEI	28,771	(2.3) %	5.5 %
SHANGHAI COMPOSITE	3,568	0.9 %	1.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.14	(0.0) %	1.6 %
EUR/USD	1.16	(0.5) %	(5.5) %
GBP/USD	1.35	(0.2) %	(1.4) %
USD/JPY	111.72	0.1 %	8.3 %
USD/AUD	1.39	0.1 %	6.9 %
USD/SGD	1.36	0.0 %	2.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	75	0.3 %	57.6 %
Gold(INR/10g)	46,212	1.3 %	(9.4) %
Gold Comex(USD/oz)	1,757	1.4 %	(9.9) %
SILVER(INR/1Kg)	59,451	2.4 %	(13.7) %
Aluminium(USD/MT)	2,851	(2.1) %	41.6 %
Copper(USD/MT)	9,041	(2.0) %	14.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	(0.0) %	0.6 %

Global Economy: The Institute for Supply Management or ISM showed an acceleration in the pace of growth in US manufacturing activity in the month of September. The ISM said its US manufacturing purchasing managers index or PMI crept up to 61.1 in September from 59.9 in August, with a reading above 50 indicating growth in the manufacturing sector. The US Commerce Department released a report on Friday showing US construction spending came in flat in the month of August. The report said construction spending came in virtually unchanged at an annual rate of \$1.584 trillion in August after rising by 0.3% to a revised rate of \$1.584 trillion in July. Spending on private construction edged down by 0.1% to a rate of \$1.242 trillion in August from a revised rate of \$1.244 trillion in July. Eurozone manufacturing activity continued to ease in September as supply-side constraints dampened production, survey results from IHS Markit showed on Friday. The final manufacturing Purchasing Managers' Index fell to 58.6 in September from 61.4 in August. This was the lowest since February and below the 'flash' print of 58.7. The headline index saw its largest fall since April 2020. Japan's consumer confidence rose to the highest level in nineteen months in September, data from the Cabinet Office showed on Friday. On a seasonally adjusted basis, the consumer confidence index increased to 37.8 in September from 36.7 in August. The latest index was the highest since February last year, when it was 38.4. Japan manufacturing sector continued to expand in September, with a manufacturing PMI score of 51.5, the latest survey from Jibun Bank showed on Friday. That's down from 52.7 in August.

Global Equities: The US stocks saw good buying on Friday with bargain hunting pushing up DOW by 1.4% on the day.

Indian Economy: The recovery of the Indian manufacturing industry was extended to September, as companies benefited from strengthening demand conditions amid the easing of COVID-19 restrictions. With sales rising at a stronger rate, firms scaled up production and purchased additional inputs. There was also a faster upturn in international sales and an improvement in business confidence. Rising from 52.3 in August to 53.7 in September, the seasonally adjusted IHS Markit India Manufacturing Purchasing Managers' Index highlighted a stronger expansion in overall business conditions across the sector.

Equity Markets: Benchmark indices ended with steep losses on Friday, declining for the fourth session in a row. The Nifty managed to close above the 17,500 mark after hitting the day's low of 17,452.90. Pharma, PSU banks and consumer durable stocks were in demand while realty and financial shares corrected.

Corporate News: Metal counters will be in focus on a massive spurt in COMEX Copper which jumped by nearly 3% on Friday. Hero Motocorp company dispatched 5,30,346 units of motorcycles and scooters in September 2021 against 7,15,718 units sold in September 2020. JSW Steel acquired 80% of the issued and paid-up equity share capital and zero coupon CCDS of Neotrex Steel.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(268.3)	54.3	10.0
MF(INR cr)	924.6	352.8	424.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	70,253	70,253	70,723
F&O(INR cr)	3,359,399	3,359,399	5,262,182

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.1	19.4	18.0
NSE VIX	17.2	17.2	16.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	37,226	(0.5) %	9.9 %	Energy	23,000	0.6 %	24.2 %
IT	34,781	(0.7) %	33.9 %	Pharma	14,588	0.8 %	17.9 %
Metals	5,639	0.5 %	34.6 %	Finance	18,138	(0.9) %	14.0 %
Auto	10,597	(0.0) %	5.7 %	PSU	2,501	0.7 %	12.9 %
FMCG	40,399	(0.1) %	15.8 %	Real Estate	506	(1.5) %	50.7 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Muthoot Fi	1,534	5.8 %	26.3 %	Bajaj Fins	17,178	(3.4) %	75.5 %
Jindal Ste	402	3.2 %	8.3 %	P I Indust	3,100	(2.5) %	37.8 %
M & M	828	3.1 %	2.5 %	Maruti Suz	7,162	(2.4) %	3.4 %
GAIL (Indi	163	2.7 %	16.4 %	Interglobe	1,976	(2.3) %	22.2 %
Yes Bank	13	2.4 %	(18.2) %	Asian Pain	3,178	(2.1) %	24.5 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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