



06 Oct.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,822	0.7 %	19.9 %
BSE SENSEX	59,745	0.8 %	19.4 %
CNX BANK	37,741	0.4 %	11.5 %
CNX MIDCAP	31,009	0.4 %	28.6 %
CNX SMALLCAP	11,125	0.4 %	34.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,315	0.9 %	12.1 %
S&P 500	4,346	1.1 %	15.7 %
FTSE 100	7,077	0.9 %	7.7 %
HANG SENG	24,104	0.3 %	(12.3) %
NIKKEI	27,822	(2.2) %	2.1 %
SHANGHAI COMPOSITE	3,568	0.9 %	1.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.25	0.2 %	1.8 %
EUR/USD	1.16	0.2 %	(5.3) %
GBP/USD	1.36	0.9 %	(0.5) %
USD/JPY	111.03	(0.6) %	7.6 %
USD/AUD	1.37	(0.9) %	5.9 %
USD/SGD	1.36	(0.2) %	2.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	78	2.3 %	63.0 %
Gold(INR/10g)	46,462	0.6 %	(8.9) %
Gold Comex(USD/oz)	1,771	0.8 %	(9.1) %
SILVER(INR/1Kg)	60,472	0.8 %	(12.2) %
Aluminium(USD/MT)	2,889	0.8 %	43.5 %
Copper(USD/MT)	9,268	1.7 %	17.0 %

FIXED INCOME

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

Global Economy: Activity in the US service sector rose at a slightly faster pace in the month of September, according to a report released by the Institute for Supply Management on Tuesday. The ISM said its services PMI inched up to 61.9 in September from 61.7 in August, with a reading above 50 indicating growth in the service sector. A report released by the Commerce Department on Tuesday showed the US trade deficit widened by much more than expected in the month of August. The Commerce Department said the trade deficit widened to a record \$73.3 billion in August from a revised \$70.3 billion in July. Eurozone private sector growth moderated for the second straight month as shortages of inputs impeded both manufacturing and service sector output, final data from IHS Markit showed on Tuesday. The final composite output index fell to 56.2 in September from 59.0 in August. The flash reading was 56.1. The rates of growth were considerably slower than in August in both manufacturing and services sectors. The services Purchasing Managers' Index dropped to 56.4 from 59.0 in the previous month. The reading was slightly above the flash 56.3. Australia's RBA policy board headed by Governor Philip Lowe decided to leave its cash rate unchanged at a record low of 0.10%. The board maintained the target of 10 basis points for the April 2024 Australian Government bond. The board also voted to continue with the purchase of government securities at the rate of A\$4 billion a week until at least mid February 2022. The bank repeated that it will not increase the cash rate until actual inflation is sustainably within the 2 to 3% target range. The central scenario for the economy is that this condition will not be met before 2024.

Global Equities: The US stocks saw impressive gains amid steady economic cues and good bargain buying support.

Indian Economy: India's services sector expanded for a second straight month in September. The IHS Markit Services Purchasing Managers' Index eased to 55.2 in September from August's 18-month high of 56.7, but stayed comfortably above the 50-mark separating growth from contraction. Business expectations remained positive on hopes the pandemic would continue to retreat and restrictions ease, but the outlook was muted by concerns over high inflationary pressures. However, the input costs rose for a 15th straight month.

Equity Markets: The domestic equity benchmarks ended near the day's high on Tuesday. The Nifty closed above the 17,800 mark. Oil & gas, IT, and auto stocks advanced while pharma, metals and realty stocks declined.

Corporate News: A spirited rally in WTI Crude to around 2014 high will keep oil related stocks in focus. Marico said that revenue growth in September 2021 quarter was in the low twenties, with volume growth close to double-digits on a 2-year CAGR basis. The International business delivered double digit constant currency growth as the company witnessed positive trends in all markets, except Vietnam. Phillips Carbon Black company closed its qualified institutional placement issue and raised Rs 400 crore by issuing over 1.63 crore shares at Rs 244 per share.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	435.4	325.1	15.2
MF(INR cr)	(156.2)	(140.8)	410.8

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	80,152	76,823	70,872
F&O(INR cr)	4,445,455	3,834,038	5,243,428

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	22.2	22.2	18.0
NSE VIX	16.4	16.8	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	37,741	0.4 %	11.5 %	Energy	24,006	2.9 %	29.6 %
IT	35,544	1.2 %	36.8 %	Pharma	14,738	(0.5) %	19.1 %
Metals	5,800	(0.1) %	38.5 %	Finance	18,367	0.3 %	15.4 %
Auto	10,692	0.5 %	6.7 %	PSU	2,542	(0.4) %	14.8 %
FMCG	40,428	(0.0) %	15.9 %	Real Estate	510	(1.4) %	51.9 %

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>
ONGC	164	10.9 %	56.8 %	Cipla	935	(2.4) %	14.2 %
Adani Tran	1,718	5.0 %	71.9 %	DLF	416	(2.1) %	42.4 %
Piramal En	2,922	4.9 %	64.2 %	Hindalco I	495	(2.1) %	41.4 %
IndusInd B	1,169	4.4 %	17.6 %	Jubilant F	4,069	(1.9) %	37.9 %
Coal India	198	4.2 %	49.8 %	Shree Ceme	28,766	(1.8) %	(4.0) %

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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