



08 Oct.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,790	0.8 %	19.7 %
BSE SENSEX	59,678	0.8 %	19.3 %
CNX BANK	37,753	0.6 %	11.5 %
CNX MIDCAP	31,304	1.9 %	29.8 %
CNX SMALLCAP	11,168	1.2 %	34.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,755	1.0 %	13.6 %
S&P 500	4,400	0.8 %	17.1 %
FTSE 100	7,078	1.2 %	7.7 %
HANG SENG	24,702	3.1 %	(10.1) %
NIKKEI	27,678	0.5 %	1.5 %
SHANGHAI COMPOSITE	3,568	0.9 %	1.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.67	0.3 %	2.4 %
EUR/USD	1.16	(0.3) %	(5.7) %
GBP/USD	1.36	(0.2) %	(0.5) %
USD/JPY	111.50	0.2 %	8.1 %
USD/AUD	1.38	0.3 %	6.2 %
USD/SGD	1.36	0.2 %	2.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	77	(1.9) %	62.6 %
Gold(INR/10g)	46,701	0.6 %	(8.5) %
Gold Comex(USD/oz)	1,765	0.2 %	(9.5) %
SILVER(INR/1Kg)	61,062	1.1 %	(11.3) %
Aluminium(USD/MT)	2,880	(0.5) %	43.0 %
Copper(USD/MT)	9,096	0.0 %	14.9 %

FIXED INCOME

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

Global Economy: The US Labor Department released a report on Thursday showing a pullback in first-time claims for US unemployment benefits in the week ended October 2nd. The report said initial jobless claims fell to 326,000, a decrease of 38,000 from the previous week's revised level of 364,000. The near-term increase in Eurozone inflation was largely driven by temporary factors that would fade in the medium term and not call for policy tightening, policymakers of the European Central Bank said at the September governing council meeting. Germany's industrial production declined more than expected in August, data from Destatis revealed on Thursday. Industrial output fell 4% month-on-month in August, reversing a 1.3% rise in July. Compared with February 2020, the month before restrictions were imposed due to the corona pandemic, production was 9% lower in August. UK house prices grew 1.7% month-on-month in September, following an increase of 0.8% in August. This was the third consecutive rise in prices. In three months to September, house prices grew 1.5% from the previous three months. The annual rate of house price growth increased to 7.4% from 7.2% in August. Japan's coincident indicator index extended a decline in August from the previous month, the government said on Thursday, although it said economic conditions were improving. The index of coincident economic indicators, which consists of a range of data including factory output, employment, and retail sales, fell to 91.5 in August 2021 from a final 94.4 a month earlier, preliminary data showed. This was the weakest reading since February.

Global Equities: The US stocks moved up impressively as traders eyed negotiations to raise the debt limit.

Indian Economy: The latest round of FICCI's Economic Outlook Survey has put forth an annual median GDP growth forecast for 2021-22 at 9.1%, marking a marginal improvement from the growth projection of 9.0% recorded in the previous survey round (July 2021). Economic recovery, post the second wave of the pandemic, seems to be holding ground and the same is also reflected in the incoming data on various high frequency indicators. The forthcoming festive season should support this momentum, the report stated. However, a note of caution continues to underline as far as the health and economic situation is concerned as Diwali could see likely surge in people's movement can again lead to a rise in number of new covid cases.

Equity Markets: The domestic equity benchmarks ended with strong gains on Thursday. The Nifty closed tad below the 17,800 mark after hitting the day's high of 17,857.55 in afternoon trade. Traders lapped up shares ahead of RBI's monetary policy outcome and Q2 earnings season that is set to kick off on Friday, 8 October 2021.

Corporate News: Tata Consultancy Services will be watched as the company will announce September 2021 quarter earnings today. KPI Global Infrastructure has signed a new long-term Power Purchase Agreement (PPA) with GHCL Limited, Bhilad for the sale of 1.25 MW solar power for a period of 20 years under the Independent Power Producer (IPP) business vertical. Ratnamani Metals & Tubes has received a new order of Rs 98 crore for the supply of carbon steel pipes from the domestic oil and gas sector, to be executed in 5 to 12 months.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(105.0)	156.0	14.7
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)	79,538	78,403	71,027
F&O(INR cr)	11,264,204	6,154,035	5,311,500

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.3	22.1	18.1
NSE VIX	16.2	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	37,753	0.6 %	11.5 %	Energy	23,804	(0.4) %	28.6 %
IT	35,704	1.8 %	37.4 %	Pharma	14,562	0.7 %	17.7 %
Metals	5,660	0.6 %	35.1 %	Finance	18,337	0.2 %	15.3 %
Auto	11,032	4.4 %	10.1 %	PSU	2,509	0.6 %	13.3 %
FMCG	40,226	0.1 %	15.3 %	Real Estate	533	6.2 %	58.6 %

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>
Tata Motor	377	12.0 %	22.3 %	O N G C	160	(4.6) %	53.7 %
Titan Comp	2,375	10.6 %	52.3 %	GAIL (Indi	160	(4.1) %	13.9 %
Bandhan Ba	329	7.5 %	(6.4) %	Indus Towe	306	(2.2) %	19.9 %
M & M	878	5.3 %	8.7 %	Dr Reddy's	4,891	(1.3) %	6.6 %
Cholaman.I	584	4.2 %	3.8 %	Coal India	191	(1.1) %	44.3 %

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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