



12 Jan.2022

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	18,056	0.3 %	21.4 %
BSE SENSEX	60,617	0.4 %	21.2 %
CNX BANK	38,442	0.2 %	13.5 %
CNX MIDCAP	31,400	0.1 %	30.2 %
CNX SMALLCAP	11,647	0.1 %	40.6 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	36,252	0.5 %	(0.2) %
S&P 500	4,713	0.9 %	(1.1) %
FTSE 100	7,491	0.6 %	(0.2) %
HANG SENG	23,739	(0.0) %	2.0 %
NIKKEI	28,222	(0.9) %	(3.7) %
SHANGHAI COMPOSITE	3,567	(0.7) %	(1.8) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.00	(0.4) %	(0.5) %
EUR/USD	1.13	0.2 %	(0.4) %
GBP/USD	1.36	0.3 %	0.4 %
USD/JPY	115.47	(0.3) %	0.3 %
USD/AUD	1.39	(0.1) %	1.2 %
USD/SGD	1.36	(0.3) %	0.5 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	79	(0.7) %	2.5 %
Gold(INR/10g)	47,500	0.2 %	(1.4) %
Gold Comex(USD/oz)	1,806	0.5 %	(0.5) %
SILVER(INR/1Kg)	60,262	0.2 %	(2.9) %
Aluminium(USD/MT)	2,806	(4.0) %	(0.3) %
Copper(USD/MT)	9,692	0.3 %	0.3 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	1.8	0.0 %	0.2 %

**Global Economy:** Global economic growth will dip sharply from 5.5% in 2021 to 4.1% in 2022 and 3.2% in 2023, according to the World Bank's Global Economic Prospects Report, released on Tuesday. The report also flagged the risks posed by growing inequality and rising inflation. The US Fed sees an economy where the labor market is recovering rapidly and inflation is well above 2%. The economy no longer needs or wants the highly accommodative policies Fed had in place to deal with the pandemic. But it is a long way to normal, Fed Chief Jerome Powell said during his nomination testimony before the US Senate Committee on Banking, Housing and Urban Affairs. He highlighted the Fed's concerns about inflation and noted that central bank was likely to raise interest rates this year. UK retail sales increased 2.1% on a yearly basis in December, despite the recent Omicron outbreak, data released by the British Retail Consortium, or BRC, showed on Tuesday. For the whole year of 2021, retail sales were up 9.9%. On a like-for-like basis, sales rose 0.6% in December and 8.9% over the whole of 2021. Japan's index of leading economic indicators, a gauge of the economy a few months ahead, compiled from data such as job offers and consumer sentiment, rose 1.5 points to 103.0 after a final 101.5 a month earlier. This marked the highest level since July, amid a surge in vaccinations and easing supply-chain disruptions. The coincident indicator index rose in November for a second month, the government said on Tuesday, as nationwide COVID-19 infections stayed low through the month. Australia posted a merchandise trade surplus of AUD 9.423 billion in November, the Australian Bureau of Statistics said on Tuesday, down from the downwardly revised AUD 10.781 billion surplus in October. It was the smallest trade surplus since April, amid softening global demand as more countries battled with a resurgence of coronavirus infections. Exports grew 2% month-over-month to AUD 43.86 billion and imports rose at a faster 6% to a 23-month high of AUD 34.44 billion.

**Global Equities:** US stocks saw sideways action on continued worries over a tight monetary policy in coming months.

**Indian Economy:** The World Bank's Global Economic Prospects Report kept its 8.3% growth projection for India in 2021-22 unchanged but upgraded its forecast for 2022-23 and 2023-24 to 8.7% and 6.8%, respectively. Food prices matter the most to Indians' households when it comes to their concerns on inflation. Household expectations which is among the most challenging to gauge are influenced by food prices the most followed by non-food items, of late even services inflation matters says a research paper by RBI economists.

**Equity Markets:** Domestic equity benchmarks ended with decent gains on Tuesday, extended their winning run to third consecutive session. The Nifty closed above the 18,050 level. Realty and IT stocks advanced while metal stocks declined.

**Corporate News:** UltraTech Cement announced the commissioning of Line II of the Bara Grinding Unit in Uttar Pradesh, having a cement capacity of 2 mtpa (million tonnes per annum). The Line I was earlier commissioned in January 2020 and is already operating at a capacity utilisation in excess of 80%. RITES company signed a memorandum of understanding (MoU) with SMEC Group to cooperate and explore infrastructure projects.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(19.6)	65.3	(17.0)
MF(INR cr)	1,137.6	650.2	560.5

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	70,655	37,879	66,715
F&O(INR cr)	6,450,286	8,291,490	6,045,424

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.4	0	18.5
NSE VIX	17.8	17.3	16.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	38,442	0.2 %	13.5 %	Energy	24,003	1.2 %	29.6 %
IT	38,605	1.0 %	48.6 %	Pharma	13,854	(0.0) %	11.9 %
Metals	5,610	(1.9) %	33.9 %	Finance	18,539	0.3 %	16.5 %
Auto	11,480	(0.2) %	14.5 %	PSU	2,754	(0.2) %	24.3 %
FMCG	37,850	(0.4) %	8.5 %	Real Estate	498	0.6 %	48.3 %

### 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>
Adani Gree	1,568	9.0 %	35.2 %	Jindal Ste	384	(5.0) %	3.5 %
Adani Ente	1,844	5.2 %	66.5 %	S A I L	104	(4.9) %	24.5 %
HCL Techno	1,344	4.3 %	34.0 %	JSW Steel	646	(3.9) %	26.9 %
Adani Port	765	3.6 %	3.9 %	Tata Steel	1,130	(3.3) %	31.0 %
Cholaman.I	579	3.2 %	3.0 %	Avenue Sup	4,505	(2.8) %	54.7 %

### EVENTS CALENDAR

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

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