



12 Oct.2021

**INDEX PERFORMANCE**

| INDIAN INDICES | LATEST | % 1D  | % YTD  |
|----------------|--------|-------|--------|
| CNX NIFTY      | 17,946 | 0.3 % | 20.7 % |
| BSE SENSEX     | 60,136 | 0.1 % | 20.2 % |
| CNX BANK       | 38,294 | 1.4 % | 13.1 % |
| CNX MIDCAP     | 31,631 | 0.6 % | 31.2 % |
| CNX SMALLCAP   | 11,436 | 1.2 % | 38.1 % |

  

| GLOBAL INDICES     | LATEST | % 1D    | % YTD   |
|--------------------|--------|---------|---------|
| DOW JONES          | 34,496 | (0.7) % | 12.7 %  |
| S&P 500            | 4,361  | (0.7) % | 16.1 %  |
| FTSE 100           | 7,147  | 0.7 %   | 8.7 %   |
| HANG SENG          | 25,325 | 2.0 %   | (7.8) % |
| NIKKEI             | 28,498 | 1.6 %   | 4.5 %   |
| SHANGHAI COMPOSITE | 3,592  | (0.0) % | 2.5 %   |

**FOREX RATES**

|         | LATEST | % 1D    | % YTD   |
|---------|--------|---------|---------|
| USD/INR | 74.91  | 0.3 %   | 2.7 %   |
| EUR/USD | 1.16   | 0.0 %   | (5.7) % |
| GBP/USD | 1.36   | 0.1 %   | (0.2) % |
| USD/JPY | 111.99 | 0.4 %   | 8.5 %   |
| USD/AUD | 1.37   | (0.1) % | 5.5 %   |
| USD/SGD | 1.36   | (0.1) % | 2.6 %   |

**COMMODITIES**

|                    | LATEST | % 1D    | % YTD    |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 79     | 1.3 %   | 66.6 %   |
| Gold(INR/10g)      | 46,897 | 0.2 %   | (8.1) %  |
| Gold Comex(USD/oz) | 1,757  | (0.2) % | (9.9) %  |
| SILVER(INR/1Kg)    | 61,254 | 0.5 %   | (11.0) % |
| Aluminium(USD/MT)  | 2,902  | (0.5) % | 44.1 %   |
| Copper(USD/MT)     | 9,246  | 0.8 %   | 16.8 %   |

**FIXED INCOME**

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 1.6    | 0.0 %  | 0.7 %   |

**Global Economy:** The overall number of global Covid cases is fast approaching 138 million amid mass vaccination efforts in different parts of the world. According to Johns Hopkins University (JHU), the total Covid case count and fatalities stand at 237,854,917 and 4,851,562, respectively, as of Monday. The US has recorded 44,339,747 cases and 713,227 fatalities to date, according to the university data. Brazil currently has the world's second-highest pandemic death toll after the United States and the third-largest caseload after the United States and India. Brazil has registered 21,575,820 cases so far. The country's Covid death toll has also risen to 601,011 as it has been experiencing a new wave of cases since January. IMF noted in a latest update that the global economy is recovering from the pandemic amidst an uncertain path. Growth in per capita incomes of advanced countries and many emerging and developing economies (EMDEs) continue to diverge, largely driven by uneven vaccine access, fiscal space and financial capacity to respond to the crisis. After severe output losses due to the pandemic, growth in the near term in many EMDEs is improving largely due to increasing domestic demand and higher commodity prices. Multiple social and economic challenges - food insecurity, increasing inequality, persistent unemployment and informality, setbacks in education and human capital development, heightened debt vulnerabilities, conflict, fragility and migration, climate change and increasing inflation risks - remain and weigh on medium-term prospects of most EMDEs.

**Global Equities:** The US and European stocks saw thin moves amid lack of major economic cues on Monday.

**Indian Economy:** Nitin Gadkari, Minister of Road Transport and Highways, Govt of India said that in order to reduce pollution levels in the country, the Government is aiming at an INR 2 lakh crore ethanol economy from its present size of INR 20,000 crore as the development of an extensive ethanol industry would mean new markets for the country's biomass and agriculture sector. Gadkari highlighted that the flex-fuel vehicles will play a crucial role to decarbonize the transport sector, making it sustainable for the environment, economy, and ecology. The government intends to have electric vehicle sales penetration of 30% for private cars, 70% for commercial vehicles, 40% for buses and 80% for two and three-wheelers by 2030. Gadkari noted that there is a substantial response seen in the domestic market for electric vehicles like electric rickshaws, cars, scooters, and electric bicycles.

**Equity Markets:** Equity indices ended a volatile trading session to end at record closing high level on Monday. The Nifty closed below the crucial 18,000 mark after hitting a record high of 18,041.95 in intraday while the Sensex also hit an all time high of 60,476.13. Barring IT and media stocks, majority buying was seen in auto, banking and metal shares.

**Corporate News:** Metal counters will be in focus as COMEX Copper soared 2% to hit a three week high. Delta Corp posted consolidated loss at Rs 22.57 crore in Q2FY22 against loss of Rs 54.91 crore in Q2FY21 while its revenue jumped to Rs 74.72 crore from Rs 38.37 crore YoY. HFCL reported higher consolidated profit at Rs 85.94 crore in Q2FY22 against Rs 53.32 crore in Q2FY21 while its revenue rose to Rs 1,122.05 crore from Rs 1,054.32 crore YoY.



### FUND FLOWS

|             | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (332.0)       | 24.0       | 10.7       |
| MF(INR cr)  | 2,010.9       | 378.4      | 423.7      |

### MARKET TURNOVER

|              | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 91,358        | 80,528         | 71,255         |
| F&O(INR cr)  | 4,527,956     | 5,579,142      | 5,293,643      |

### MARKET VOLATILITY

|          | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 18.8          | 21.2           | 18.1           |
| NSE VIX  | 16.1          | 16.5           | 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  | 38,294        | 1.4 %       | 13.1 %       | Energy      | 24,162        | 1.1 %       | 30.5 %       |
| IT     | 35,180        | (3.4) %     | 35.4 %       | Pharma      | 14,615        | 0.7 %       | 18.1 %       |
| Metals | 5,766         | 1.5 %       | 37.7 %       | Finance     | 18,528        | 1.4 %       | 16.5 %       |
| Auto   | 11,376        | 2.7 %       | 13.5 %       | PSU         | 2,570         | 0.8 %       | 16.0 %       |
| FMCG   | 40,318        | 0.8 %       | 15.6 %       | Real Estate | 530           | 1.7 %       | 57.8 %       |

### 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         | 416           | 8.6 %       | 35.1 %       | TCS               | 3,686         | (6.4) %     | 16.4 %       |
| Avenue Sup         | 4,719         | 7.1 %       | 62.0 %       | Bandhan Ba        | 327           | (5.6) %     | (7.0) %      |
| NMDC               | 153           | 5.1 %       | 10.5 %       | Tech Mahin        | 1,400         | (2.8) %     | 41.1 %       |
| Coal India         | 197           | 4.5 %       | 49.0 %       | United Spi        | 896           | (2.0) %     | 60.5 %       |
| Interglobe         | 2,048         | 4.4 %       | 26.7 %       | Infosys           | 1,691         | (1.9) %     | 22.1 %       |

### 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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