



13 Oct.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,992	0.3 %	21.0 %
BSE SENSEX	60,284	0.2 %	20.5 %
CNX BANK	38,522	0.6 %	13.8 %
CNX MIDCAP	31,806	0.6 %	31.9 %
CNX SMALLCAP	11,528	0.8 %	39.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,378	(0.3) %	12.3 %
S&P 500	4,351	(0.2) %	15.8 %
FTSE 100	7,130	(0.2) %	8.5 %
HANG SENG	24,963	(1.4) %	(9.1) %
NIKKEI	28,231	(0.9) %	3.6 %
SHANGHAI COMPOSITE	3,547	(1.3) %	1.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.85	(0.1) %	2.6 %
EUR/USD	1.16	0.1 %	(5.7) %
GBP/USD	1.36	(0.0) %	(0.3) %
USD/JPY	112.24	0.2 %	8.8 %
USD/AUD	1.37	0.0 %	5.5 %
USD/SGD	1.36	(0.1) %	2.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	81	1.5 %	69.1 %
Gold(INR/10g)	47,119	0.5 %	(7.6) %
Gold Comex(USD/oz)	1,759	0.1 %	(9.8) %
SILVER(INR/1Kg)	61,537	0.5 %	(10.6) %
Aluminium(USD/MT)	3,020	4.1 %	50.0 %
Copper(USD/MT)	9,527	3.0 %	20.3 %

FIXED INCOME

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

Global Economy: The International Monetary Fund (IMF) on Tuesday said the global economic recovery is continuing, but the momentum has weakened due the resurgence of the Covid-19 pandemic triggered by the Delta variant. In its latest World Economic Outlook report, the global lender retained its 4.9% global growth projection for next year, while it lowered the forecast for this year to 5.9% from 6% in July. Advanced economies are expected to grow 5.2% this year versus 5.6% seen in July. The growth forecast for the US for this year was lowered to 6% from 7%. Eurozone growth forecast for this year was raised to 5%. China's growth forecast for both years were lowered by 0.1 percentage point each to 8% and 5.6%, respectively. German ZEW institute's gauge of expectations fell to 22.3 in October from 26.5 the previous month, the lowest since the start of coronavirus lockdowns last year. The investor confidence declined for a fifth month in October, adding to evidence that global supply bottlenecks and a surge in inflation are weighing on the recovery in Europe's largest economy. UK employment increased sharply in September, data from the Office for National Statistics showed on Tuesday. The number of payroll employees showed another monthly increase, up 207,000 to a record 29.2 million in September. In three months to August, the employment rate increased 0.5 percentage points on the quarter, to 75.3%. Japan value of overall bank lending was up 0.6 percent on year in September, the Bank of Japan said on Tuesday, coming in at 577.140 trillion yen. That follows the 0.6% annual increase in August. Australia NAB business confidence index surged to 13 in September 2021 from a downwardly revised -6 in August, pointing to the highest reading since May.

Global Equities: The US stocks saw choppy moves on economic growth worries and lack of major buying support.

Indian Economy: The Consumer Price Index-based (CPI) inflation or retail inflation for the month of September 2021 came in at 4.35%, easing from 5.30% in August, data released by the National Statistical Office (NSO) showed on October 12. This is the lowest retail inflation print since January 2021. India's industrial production rose 11.9% in August. During April-August this year, IIP grew 28.6% against a 25% contraction in the same period last year. India's economy, which contracted by 7.3% due to the COVID-19 pandemic, is expected to grow by 9.5% in 2021 and 8.5% in 2022, according to latest projections released by the International Monetary Fund on Tuesday, maintaining its previous projections.

Equity Markets: Equity indices ended at the day's high amid a volatile trading session on Tuesday. The Nifty managed to close near the 18,000 mark after hitting an intraday low of 17,864.95 in early afternoon trade. High crude oil prices and a weak rupee capped gains. Barring IT index, all other sectoral indices on the NSE ended in the green.

Corporate News: Reliance Industries Ltd (RIL) said its unit Reliance New Energy Solar Limited (RNE SL) has invested 25 million euros to buy new shares of Germany's NexWafe GmbH as part of a strategic partnership for the Indian market. Tata Motors approved incorporation of a wholly owned subsidiary (TML EVCo), to undertake its passenger electric mobility business; and execution of a Securities Subscription Agreement with India Markets Rio Pte Ltd, an entity affiliated with TPG Rise Climate which will invest Rs 7,500 crore in TML EVCo. Infosys, Wipro and Mindtree will be in focus ahead of latest quarterly earnings.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(43.3)	14.4	10.3
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)	81,435	80,642	71,333
F&O(INR cr)	5,273,527	5,540,940	5,293,491

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.8	20.8	18.1
NSE VIX	15.9	16.4	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	38,522	0.6 %	13.8 %	Energy	24,266	0.4 %	31.1 %
IT	34,870	(0.9) %	34.2 %	Pharma	14,629	0.1 %	18.2 %
Metals	5,829	1.1 %	39.2 %	Finance	18,590	0.3 %	16.8 %
Auto	11,476	0.9 %	14.5 %	PSU	2,649	3.1 %	19.6 %
FMCG	40,809	1.2 %	17.0 %	Real Estate	534	0.7 %	58.9 %

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>
Titan Comp	2,493	5.5 %	59.8 %	HCL Techno	1,250	(4.0) %	24.7 %
Jubilant F	4,276	5.2 %	44.9 %	HDFC Life	703	(1.9) %	1.8 %
Vedanta	312	4.9 %	35.0 %	Tech Mahin	1,374	(1.8) %	38.5 %
Adani Gree	1,208	4.0 %	4.2 %	Coal India	193	(1.8) %	46.3 %
Bajaj Auto	3,979	3.3 %	6.3 %	Torrent Ph	3,114	(1.7) %	22.2 %

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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