



15 Sep.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,380	0.0 %	16.9 %
BSE SENSEX	58,247	0.1 %	16.4 %
CNX BANK	36,613	0.0 %	8.1 %
CNX MIDCAP	29,872	0.0 %	23.9 %
CNX SMALLCAP	10,776	0.0 %	30.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,578	(0.8) %	13.0 %
S&P 500	4,443	(0.6) %	18.3 %
FTSE 100	7,034	(0.5) %	7.0 %
HANG SENG	25,502	(1.2) %	(7.2) %
NIKKEI	30,670	0.7 %	12.5 %
SHANGHAI COMPOSITE	3,663	(1.4) %	4.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.48	(0.0) %	0.7 %
EUR/USD	1.18	(0.2) %	(3.8) %
GBP/USD	1.38	0.1 %	1.3 %
USD/JPY	110.02	0.1 %	6.6 %
USD/AUD	1.36	0.1 %	4.7 %
USD/SGD	1.34	(0.1) %	1.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	1.0 %	47.9 %
Gold(INR/10g)	46,802	(0.1) %	(8.3) %
Gold Comex(USD/oz)	1,792	0.2 %	(8.1) %
SILVER(INR/1Kg)	62,656	(0.4) %	(9.0) %
Aluminium(USD/MT)	2,950	1.8 %	46.5 %
Copper(USD/MT)	9,627	1.2 %	21.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	(0.0) %	0.4 %

Global Economy: The US Labor Department on Tuesday showed a modest increase in US consumer prices in the month of August. The Labor Department said its consumer price index rose by 0.3% in August after climbing by 0.5% in July. The consumer price growth was partly due to another sharp increase in energy prices, which spiked by 2% in August after jumping by 1.6% in July. Excluding food and energy prices, core consumer prices inched up by just 0.1% in August after rising by 0.3% in July. The report also showed a slowdown in the annual rate of consumer price growth, which dipped to 5.3% in August from 5.4% in July. Japan's industrial production declined in July, as initially estimated, data from the Ministry of Economy, Trade and Industry said. Industrial production fell a seasonally adjusted 1.5% monthly in July, as estimated. Shipments decreased 0.3% on month in July and inventories fell 0.7%. Meanwhile, the inventory ratio grew 1%. On a yearly basis, industrial production accelerated 11.6% in July, as initially estimated. UK unemployment rate dropped 0.3 percentage points from the previous quarter to 4.6% in three months to July, data published by the Office for National Statistics (ONS) showed on Tuesday. At the same time, the employment rate rose 0.5 percentage points to 75.2%. The current Delta outbreak and lockdowns are a significant setback for Australia that would cause a sharp GDP contraction in Q3 of 2021, likely to be at least 2% and possibly significantly more, the Reserve Bank of Australia's Governor Philip Lowe said in a speech. The outbreak is a significant setback for the economy and it has introduced an additional element of uncertainty about the future. But there is a clear path out of the current difficulties and it is likely that we will return to a stronger economy next year.

Global Equities: The US stocks fell after United States president Joe Biden announced his plan to increase taxes. Traders also remained concerned about a fresh outbreak of Covid-19 in China.

Indian Economy: The wholesale price inflation recorded an annual rate of 11.39% (Provisional) for the month of August, 2021 (over August, 2020) as compared to 0.41% in August, 2020. The high rate of inflation in August 2021 is primarily due to rise in prices of non-food articles, mineral oils; crude petroleum & natural gas; manufactured products like basic metals; food products; textiles; chemicals and chemical products etc as compared the corresponding month of the previous year. The month over month change in WPI index for the month of August, 2021 (as compared to July, 2021) was 1.04 %. Core WPI inflation, which strips out fuel and food items, has also hit an all-time high of 11.1% in August.

Equity Markets: Local indices ended a volatile trading session with minor gains on Tuesday. The Nifty saw profit booking after scaling a record high level of 17,438.55 in morning trade. Profit selling towards the day end dragged the Nifty below the 17,400 mark. Media, auto and IT stocks saw buying while metal and banks declined.

Corporate News: Tata Steel on Tuesday commissioned a 5-tonne per day (TPD) carbon capture plant at its Jamshedpur Works, making it the country's first steel company to adopt such a carbon capture technology that extracts CO2 directly from the blast furnace gas. Power Finance Corporation will be in focus as UBS Group AG increased stake in the company to 5.67% from 3.4% earlier, through the rights issue. LIC Housing Finance will be watched as Life Insurance Corporation of India's stake in the company increased to 45.23% from 40.31% post preferential allotment.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	191.7	71.1	5.9
MF(INR cr)	445.5	271.1	428.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	73,458	65,183	70,035
F&O(INR cr)	3,813,741	5,984,911	5,037,523

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.4	17.5	17.7
NSE VIX	13.6	14.3	16.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	36,613	0.4 %	8.1 %	Energy	21,035	0.2 %	13.6 %
IT	35,432	0.9 %	36.4 %	Pharma	14,411	0.2 %	16.4 %
Metals	5,810	(0.5) %	38.7 %	Finance	18,104	(0.1) %	13.8 %
Auto	10,210	0.9 %	1.9 %	PSU	2,345	0.2 %	5.9 %
FMCG	40,470	(0.3) %	16.0 %	Real Estate	422	0.4 %	25.7 %

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>
Yes Bank	12	12.2 %	(20.7) %	Adani Gree	1,149	(3.0) %	(0.9) %
GAIL (Indi	156	6.9 %	11.3 %	Marico	558	(3.0) %	37.1 %
IndusInd B	1,037	4.0 %	4.4 %	SBI Cards	1,061	(2.3) %	8.9 %
Adani Tran	1,943	3.8 %	94.4 %	P & G Hygi	13,884	(2.2) %	10.5 %
Indus Towe	246	3.1 %	(3.6) %	Vedanta	303	(1.7) %	31.1 %

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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