



15 Dec.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,325	0.0 %	16.5 %
BSE SENSEX	58,117	(0.3) %	15.7 %
CNX BANK	36,894	0.0 %	9.0 %
CNX MIDCAP	31,067	0.0 %	28.8 %
CNX SMALLCAP	11,263	0.0 %	36.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,544	(0.3) %	16.1 %
S&P 500	4,634	(0.8) %	23.4 %
FTSE 100	7,219	(0.2) %	9.8 %
HANG SENG	23,636	(1.3) %	(14.0) %
NIKKEI	28,433	(0.7) %	4.3 %
SHANGHAI COMPOSITE	3,662	(0.5) %	4.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.64	0.3 %	3.7 %
EUR/USD	1.13	(0.2) %	(8.0) %
GBP/USD	1.32	32.4 %	(3.0) %
USD/JPY	113.57	0.0 %	10.1 %
USD/AUD	1.40	0.2 %	7.9 %
USD/SGD	1.37	0.2 %	3.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	0.5 %	49.7 %
Gold(INR/10g)	47,976	(0.0) %	(6.0) %
Gold Comex(USD/oz)	1,786	0.0 %	(8.4) %
SILVER(INR/1Kg)	60,738	0.0 %	(11.8) %
Aluminium(USD/MT)	2,636	(1.5) %	30.9 %
Copper(USD/MT)	9,485	(0.2) %	19.8 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.4	0.0 %	0.5 %

**Global Economy:** The Asian Development Bank (ADB) revised its economic growth outlook for developing Asia down slightly to 7.0% this year and 5.3% next year, after renewed outbreaks of coronavirus disease (COVID-19) led to slower growth in the third quarter. ADB's latest estimates, presented in a regular supplement of the Asian Development Outlook (ADO) 2021, compare with the bank's September forecasts of 7.1% growth for 2021 and 5.4% for 2022. Prospects for this year have been revised slightly downward for all subregions except Central Asia. China's economy, which staged an impressive rebound from last year's pandemic slump, has lost momentum in recent months as it grapples with surging prices, a slowing manufacturing sector, debt problems in the property market and persistent COVID-19 outbreaks. The ADB projects China's economy will grow 8.0% this year, slightly weaker than its 8.1% estimate in September, before it slows to 5.3% in 2022, down from its earlier projection of 5.5%. Eurozone industrial production rose 1.1% from a month earlier in October, rebounding from two consecutive months of contraction, data from Eurostat revealed on Tuesday. Compared with September, production of capital goods rose 3.0% in October, durable consumer goods increased 1.7%, non-durable consumer goods 0.4% and energy 0.1%, while production of intermediate goods fell 0.6%, Eurostat said. UK unemployment rate dropped 0.4 percentage points from the previous three months to 4.2% during August to October, the Office for National Statistics said Tuesday. At the same time, the employment rate increased by 0.2 percentage points on the quarter, to 75.5%. Japan's industrial production rose a seasonally adjusted 1.8% monthly in October, data from the Ministry of Economy, Trade and Industry said on Tuesday. In the initial estimate, output grew 1.1%. Shipments increased 2.4% monthly in October. According to the initial estimate, shipments rose 2%. Inventories rose 0.6% versus a 0.8% increase in the initial estimate.

**Global Equities:** The US stocks fell on concerns about monetary policy. Tech counters saw a deep correction.

**Indian Economy:** The ADB said that India, South Asia's largest economy, is now expected to grow 9.7% in fiscal year (FY) 2021, which ends 31 March 2022. The reduction of 0.3 percentage points comes amid supply chain issues that are affecting industry. India's outlook for FY2022 is maintained at 7.5%, as domestic demand is expected to normalize.

**Equity Markets:** The benchmark indices suffered modest cuts at the fag end of market hours on Tuesday. The Nifty managed to close above 17,300 level. Bank and financial stocks dragged the market while media, pharma and healthcare scrips saw decent buying.

**Corporate News:** SBI said that the Executive Committee of Central Board of the bank has accorded approval for exploring possibilities to offload 6% stake of the bank in SBI Funds Management Private Limited through IPO route. HDFC said it has invoked 50 lakh shares pledged by Ansal Housing to recover its dues from the company. Deepak Nitrite said that the meeting of the board of directors of the company is scheduled on 22 December 2021 to consider and approve raising of funds.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(253.5)	(75.2)	(15.0)
MF(INR cr)	914.5	1,347.4	533.7

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	62,204	44,637	70,359
F&O(INR cr)	6,272,738	7,504,355	5,839,626

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	21.9	24.4	18.5
NSE VIX	17.0	17.8	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	36,894	(0.1) %	9.0 %	Energy	23,361	0.8 %	26.2 %
IT	36,103	0.1 %	39.0 %	Pharma	13,576	1.1 %	9.7 %
Metals	5,667	0.4 %	35.3 %	Finance	17,905	(0.6) %	12.5 %
Auto	10,972	(0.7) %	9.5 %	PSU	2,740	(0.7) %	23.7 %
FMCG	37,643	(0.5) %	7.9 %	Real Estate	509	(0.6) %	51.6 %

### 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>
Lupin	943	6.7 %	(8.2) %	NMDC	139	(6.0) %	0.1 %
Power Grid	212	3.8 %	29.4 %	Piramal En	2,603	(5.2) %	46.2 %
Adani Gree	1,436	3.6 %	23.8 %	Cholaman.I	555	(4.2) %	(1.3) %
Adani Tran	1,873	3.3 %	87.4 %	ITC	229	(2.6) %	3.9 %
Divi's Lab	4,654	2.7 %	28.7 %	Info Edg.(	5,366	(2.3) %	25.9 %

### 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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