



16 Sep.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,877	0.0 %	1.2 %
BSE SENSEX	59,934	(0.7) %	1.1 %
CNX BANK	41,209	0.0 %	10.9 %
CNX MIDCAP	32,416	0.0 %	7.6 %
CNX SMALLCAP	10,075	0.0 %	(5.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,962	(0.6) %	(14.8) %
S&P 500	3,901	(1.1) %	(18.1) %
FTSE 100	7,282	0.1 %	(3.0) %
HANG SENG	18,930	0.4 %	(18.7) %
NIKKEI	27,876	0.2 %	(4.9) %
SHANGHAI COMPOSITE	3,200	(1.2) %	(11.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	79.40	0.0 %	6.8 %
EUR/USD	1.00	(1.3) %	(12.2) %
GBP/USD	1.15	(1.1) %	(14.7) %
USD/JPY	143.42	0.5 %	24.6 %
USD/AUD	1.48	2.0 %	7.9 %
USD/SGD	1.41	0.6 %	4.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	87	(0.5) %	13.4 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,711	0.0 %	(5.7) %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,228	(3.6) %	(20.9) %
Copper(USD/MT)	7,865	(4.4) %	(18.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	3.4	(0.0) %	1.8 %

Global Economy: The US Federal Reserve released a report on Thursday showing a modest decrease in U.S. industrial production in the month of August. The report said industrial production edged down by 0.2 percent in August after climbing by a downwardly revised 0.5 percent in July. The report also showed capacity utilization in the industrial sector dipped to 80.0 percent in August from a revised 80.2 percent in July. A report released by the Commerce Department on Thursday showed U.S. business inventories increased by less than expected in the month of July. The Commerce Department said business inventories rose by 0.6 percent in July after surging by 1.4 percent in June. The New York Fed said its general business conditions index surged to a negative 1.5 in September from a negative 31.3 in August, although a negative reading still indicates a contraction in regional manufacturing activity. Germany's wholesale price inflation eased for the fourth month in a row in August but remained at an elevated level, data from Destatis showed on Thursday. Wholesale prices logged a double-digit annual growth of 18.9 percent after rising 19.5 percent in July. The euro area trade deficit widened in July to the highest level since the series began in 1999, data released by Eurostat showed on Thursday. The trade shortfall widened to a record EUR 40.3 billion in July from EUR 32.2 billion in June.

Global Equities: The Dow and the S&P 500 suffered from lack of buying, falling to their lowest closing levels in two months.

Indian Economy: The 26th Meeting of the Financial Stability and Development Council (FSDC) was chaired by the Union Finance and Corporate Affairs Minister Nirmala Sitharaman in Mumbai. The Council deliberated on the Early Warning Indicators for the economy. It was noted that there is a need to monitor the financial sector risks, the financial conditions and market developments on a continuous basis by the Government and the regulators so that appropriate and timely action can be taken so as to mitigate any vulnerability and strengthen financial stability.

Equity Markets: Equities retreated from early highs to end with deep losses on Thursday, declining for the second consecutive day. The Sensex and the Nifty lost about 0.7% each as a lack of fresh triggers and subdued global cues weighed on the sentiment. The mid-cap space, however, showed some resilience. Trading was volatile due to the expiry of weekly index options on the NSE today.

Corporate News: Adani Ports and Special Economic Zone has signed concession agreement to develop Berth no. 2 at Haldia Dock Complex (HDC) in Bengal. APSEZ will design, build, finance, operate, maintain and manage the bulk terminal with capacity of 3.74 million tons per annum for a concession period of 30 years. The estimated cost of the project is Rs 298 crore. Indiabulls Housing Finance and RBL Bank are under the NSE's F&O ban list for 16 September. UPL announced a joint venture with CleanMax Enviro Energy Solutions ('CleanMax'), a Mumbai-based renewable energy company, to establish a hybrid solar-wind energy power plant in Gujarat, India. The project will result in UPL using renewable energy to fulfil 30% of its total power consumption needs globally. The captive project will lead to carbon abatement of 1.25 Lakh tonnes of co2 equivalent per annum.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(172.7)	107.0	(57.6)
MF(INR cr)	482.1	462.2	735.8

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	72,729	66,040	55,195
F&O(INR cr)	34,221,677	15,415,158	11,681,600

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.2	25.2	25.7
NSE VIX	18.4	18.7	19.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	41,209	(0.5) %	10.9 %	Energy	28,172	0.8 %	6.5 %
IT	27,734	(1.4) %	(23.7) %	Pharma	12,519	(1.3) %	(7.8) %
Metals	6,264	0.1 %	(3.3) %	Finance	18,655	(0.5) %	6.8 %
Auto	13,316	0.7 %	24.7 %	PSU	3,228	0.0 %	13.9 %
FMCG	44,042	(0.3) %	20.0 %	Real Estate	472	(0.9) %	(0.6) %

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>
Adani Ente	3,749	4.9 %	83.4 %	Hindalco I	424	(4.0) %	(25.6) %
Adani Tran	4,105	3.2 %	69.5 %	Infosys	1,433	(2.9) %	(24.7) %
Vedanta	314	2.8 %	(22.6) %	Tech Mahin	1,083	(2.8) %	(27.2) %
Maruti Suz	9,210	2.7 %	19.6 %	Cipla	1,033	(2.5) %	1.8 %
Ambuja Cem	539	2.7 %	76.7 %	Gland Phar	2,323	(2.3) %	(30.5) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Housing Starts	16-09-2022	17:45	CAD	-	-
Foreign Securities Purchases	16-09-2022	18:00	CAD	-	-
Retail Sales y/y	16-09-2022	07:30	CNY	-	0.027
Italian Trade Balance	16-09-2022	13:30	EUR	-	-
Final CPI y/y	16-09-2022	14:30	EUR	-	0.091
Retail Sales m/m	16-09-2022	11:30	GBP	-	0.003
BusinessNZ Manufacturing Index	16-09-2022	04:00	NZD	-	52.7
Prelim UoM Consumer Sentiment	16-09-2022	19:30	USD	-	58.2

..... End of Report