



18 Jan.2022

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	18,308	0.3 %	23.1 %
BSE SENSEX	61,309	0.1 %	22.5 %
CNX BANK	38,216	(0.4) %	12.9 %
CNX MIDCAP	32,041	0.2 %	32.9 %
CNX SMALLCAP	11,981	0.6 %	44.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,912	(0.6) %	(1.2) %
S&P 500	4,663	0.1 %	(2.2) %
FTSE 100	7,611	0.9 %	1.4 %
HANG SENG	24,218	(0.7) %	4.1 %
NIKKEI	28,334	0.7 %	(3.3) %
SHANGHAI COMPOSITE	3,542	0.6 %	(2.5) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.99	0.3 %	(0.5) %
EUR/USD	1.14	(0.1) %	0.7 %
GBP/USD	1.37	(0.1) %	1.3 %
USD/JPY	113.91	(0.4) %	(1.1) %
USD/AUD	1.38	0.6 %	0.3 %
USD/SGD	1.35	0.1 %	(0.2) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	84	3.8 %	9.5 %
Gold(INR/10g)	47,983	0.3 %	(0.4) %
Gold Comex(USD/oz)	1,817	(0.4) %	0.2 %
SILVER(INR/1Kg)	61,596	0.1 %	(0.8) %
Aluminium(USD/MT)	2,806	(5.8) %	(0.3) %
Copper(USD/MT)	9,692	(2.1) %	0.3 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	1.8	0.1 %	0.2 %

**Global Economy:** China's economy grew 8.1% for full year 2021 from a year earlier, exceeding the government's target of above 6% and following a revised 2.2% growth in 2020, according to official data from China's National Bureau of Statistics released on Monday. The economy expanded 4% year-on-year in the fourth quarter of 2021, easing from a 4.9% growth in the previous period. It was the slowest pace of expansion since the second quarter last year, amid several headwinds including a property downturn and COVID-19 outbreaks. On seasonally adjusted basis, the economy expanded 1.6% on quarter in the three months to December 2021, following an upwardly revised 0.7% advance in the previous quarter. This was the fastest quarterly growth since the fourth quarter of 2020. China's central bank, on Monday cut the borrowing costs of its medium-term loans for the first time since April 2020 to cushion any economic slowdown. The People's Bank of China (PBOC) said it was lowering the interest rate on CNY 700 billion of one-year medium-term lending facility (MLF) loans to some financial institutions by 10 basis points to 2.85% from 2.95% in previous operations. The central bank also lowered the borrowing costs of seven-day reverse repurchase agreements, or repos, by the same margin to 2.10% from 2.20%. UK house prices increased in January at the fastest pace since 2016, data from the property website Rightmove showed on Monday. House prices grew 7.6% on a yearly basis in January, following a 6.3% rise in December. On a monthly basis, house prices gained 0.3% in January, in contrast to the 0.7% fall in December.

**Global Equities:** European stocks moved up steadily on the first session of the week. The US markets were closed for Martin Luther King Jr. Day

**Indian Economy:** India's passenger vehicle sales declined 13% to 2,19,421 units in December, auto industry body SIAM said on Friday. Passenger vehicle sales in December 2020 stood at 2,52,998 units. As per the latest data by the Society of Indian Automobile Manufacturers (SIAM), two-wheeler sales also fell 11% to 10,06,062 units, compared to 11,27,917 vehicles in December 2020. In October-December period of this fiscal year, passenger vehicle sales declined 15% to 7,61,124 units from 8,97,908 units in the year-ago period.

**Equity Markets:** The domestic equity benchmarks ended with minor gains on Monday. The Nifty closed a tad above 18,300 mark. Autos, oil & gas, FMCG and realty shares advanced while banks and financial stocks corrected.

**Corporate News:** Tata Consultancy Services (TCS) has been positioned as a Leader in the Everest Group PEAK Matrix for Supply Chain Management (SCM) Business Process Services (BPS). Larsen & Toubro (L&T) on Monday said that its heavy engineering arm has flagged off five critical renewable diesel reactors to North America's largest renewable diesel producer Diamond Green Diesel (DGD), two weeks ahead of the contractual delivery date. Tata Power Renewable Energy Limited (TPREL), 100% subsidiary of Tata Power announced commissioning of two Solar Power projects of 50 MW each at Prayagraj, and Banda in Uttar Pradesh.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(347.4)	(18.4)	(19.6)
MF(INR cr)	293.5	359.9	551.9

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	5,488	43,525	66,445
F&O(INR cr)	4,617,190	8,140,360	6,082,403

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.2	0	18.5
NSE VIX	16.8	17.1	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	38,216	(0.4) %	12.9 %	Energy	25,185	1.3 %	36.0 %
IT	38,805	(0.1) %	49.4 %	Pharma	13,862	(0.7) %	12.0 %
Metals	5,888	0.3 %	40.6 %	Finance	18,522	(0.2) %	16.4 %
Auto	11,881	2.0 %	18.5 %	PSU	2,791	0.3 %	26.0 %
FMCG	37,989	0.5 %	8.9 %	Real Estate	516	1.3 %	53.7 %

### 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>
Adani Gree	1,835	8.1 %	58.2 %	HCL Techno	1,259	(5.9) %	25.5 %
Hero Motoc	2,702	5.1 %	(8.6) %	Vedanta	326	(3.1) %	40.9 %
ICICI Pru	616	4.2 %	38.6 %	HDFC Bank	1,522	(1.5) %	2.3 %
Grasim Ind	1,919	3.3 %	31.9 %	Indraprast	455	(1.4) %	(13.6) %
O N G C	166	3.0 %	58.9 %	Aurobindo	686	(1.3) %	(22.2) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
CB Leading Index m/m	18-01-2022	21:00	AUD	-	0.003
Housing Starts	18-01-2022	18:45	CAD	-	-
PPI m/m	18-01-2022	13:00	CHF	-	0.005
Italian Trade Balance	18-01-2022	14:30	EUR	-	-
ZEW Economic Sentiment	18-01-2022	15:30	EUR	-	26.8
Average Earnings Index 3m/y	18-01-2022	12:30	GBP	-	0.049
Revised Industrial Production m/m	18-01-2022	10:00	JPY	-	0.072
Empire State Manufacturing Index	18-01-2022	19:00	USD	-	31.9
NAHB Housing Market Index	18-01-2022	20:30	USD	-	84

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