



19 Jan.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	18,113	(1.1) %	21.8 %
BSE SENSEX	60,755	(0.9) %	21.4 %
CNX BANK	38,210	(0.0) %	12.9 %
CNX MIDCAP	31,381	(2.1) %	30.1 %
CNX SMALLCAP	11,687	(2.4) %	41.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,368	(1.5) %	(2.7) %
S&P 500	4,577	(1.8) %	(4.0) %
FTSE 100	7,564	(0.6) %	0.8 %
HANG SENG	24,113	(0.4) %	3.6 %
NIKKEI	28,257	(0.3) %	(3.6) %
SHANGHAI COMPOSITE	3,570	0.8 %	(1.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.15	0.2 %	(0.3) %
EUR/USD	1.14	(0.3) %	0.4 %
GBP/USD	1.37	(0.3) %	1.0 %
USD/JPY	114.52	0.5 %	(0.5) %
USD/AUD	1.39	0.5 %	0.8 %
USD/SGD	1.35	0.1 %	(0.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	84	3.8 %	9.5 %
Gold(INR/10g)	47,943	(0.1) %	(0.4) %
Gold Comex(USD/oz)	1,821	0.2 %	0.4 %
SILVER(INR/1Kg)	61,414	(0.3) %	(1.1) %
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	0.0 %	0.2 %

Global Economy: Builders in the single-family housing market are facing growing expenses, which is causing a turnaround in sentiment to start the year. Builder confidence fell one point to 83 in January, according to the National Association of Home Builders (NAHB)/Wells Fargo Housing Market Index (HMI). Anything above 50 is considered positive, but that is the first drop in four months. The index also stood at 83 in January 2021. European new car registrations declined for a sixth straight month in December and decreased for the whole year 2021 mainly due to the semiconductor shortage, the European Automobile Manufacturers' Association (ACEA) showed Tuesday. New car registrations in the EU dropped 22.8% year-on-year to 795,295 units, after a 20.5% tumble in November. The German ZEW Indicator of Economic Sentiment rose to 51.7 in January from 29.9 in the previous month. The UK unemployment rate decreased in three months to November, data from the Office for National Statistics showed Tuesday. The unemployment rate dropped to 4.1% in three months to November from 4.2% in its previous reading. The Bank of Japan left its key short-term interest rate unchanged at -0.1% and that for 10-year bond yields around 0% during its January meeting, by an 8-1 vote. For the time being, the Bank said it will closely monitor the impact of the novel coronavirus (COVID19) and will not hesitate to take additional easing measures if necessary and expects short- and long-term policy interest rates to remain at their present or lower levels. BOJ policymakers noted that risks to the price outlook were evenly balanced, with signs of a rise in inflation broadening. Growth forecasts were mixed with current GDP dropped to 2.8% from 3.4%, the 1-year outlook up 3.8% from 2.9% and the 2-year outlook dropped to 1.1% from 1.3%.

Global Equities: The US stocks tanked on Tuesday as soaring treasury yields weighed on sentiments. NASDAQ fell to a three month low.

Indian Economy: The Government of India (GoI) has announced the Sale (Re-issue) of (i) '4.56% Government Security, 2023' for a notified amount of Rs 2,000 crore (nominal) through price based auction using uniform price method (ii) '5.74% Government Security, 2026' for a notified amount of Rs 6,000 crore (nominal) through price based auction using uniform price method (iii) '6.67% Government Security, 2035' for a notified amount of Rs 9,000 crore (nominal) through price based auction using uniform price method, and (iv) '6.99% Government Security, 2051' for a notified amount of Rs 7,000 crore (nominal) through price based auction using multiple price method.

Equity Markets: The domestic equity benchmarks ended with deep cuts on Tuesday. The Nifty closed below the 18,150 mark. Selling was wide spread with autos and metals declining the most.

Corporate News: Bajaj Finance will be in focus as its profit after tax for Q3FY22 increased by 85% to Rs 2,125 crore from Rs 1,146 crore in Q3FY21. Net interest income increased by 40% to Rs 6,000 crore as against Rs 4,296 crore YoY. L&T Technology Services reported sharply higher consolidated profit at Rs 249.6 crore in Q3FY22 against Rs 186.9 crore in Q3FY21. Revenue jumped to Rs 1,687.5 crore from Rs 1,400.7 crore YoY. Tata Elxsi reported higher profit at Rs 150.95 crore in Q3FY22 against Rs 105.20 crore in Q3FY21. Revenue jumped to Rs 635.41 crore from Rs 477.09 crore YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(32.8)	(19.7)	(19.7)
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)	5,386	40,347	66,136
F&O(INR cr)	8,663,840	8,183,983	6,095,375

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.2	0	18.5
NSE VIX	17.8	17.2	16.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	38,210	(0.0) %	12.9 %	Energy	25,055	(0.5) %	35.3 %
IT	38,092	(1.8) %	46.6 %	Pharma	13,698	(1.2) %	10.7 %
Metals	5,755	(2.3) %	37.4 %	Finance	18,469	(0.3) %	16.1 %
Auto	11,599	(2.4) %	15.7 %	PSU	2,741	(1.8) %	23.8 %
FMCG	37,503	(1.3) %	7.5 %	Real Estate	503	(2.6) %	49.7 %

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	1,900	3.5 %	63.8 %	Ambuja Cem	381	(6.7) %	22.4 %
Cholaman.I	612	2.0 %	8.9 %	Apollo Hos	4,616	(6.0) %	59.5 %
Axis Bank	725	1.8 %	1.7 %	Info Edg.(5,345	(5.4) %	25.4 %
Adani Tran	2,027	1.2 %	102.8 %	ACC	2,253	(5.3) %	17.8 %
ICICI Lomb	1,448	1.1 %	0.7 %	DLF	404	(4.7) %	38.4 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Westpac Consumer Sentiment	19-01-2022	05:00	AUD	-	(0.01)
CPI m/m	19-01-2022	19:00	CAD	-	0.002
German Final CPI m/m	19-01-2022	12:30	EUR	-	0.005
Current Account	19-01-2022	14:30	EUR	-	-
HPI y/y	19-01-2022	15:00	GBP	-	0.102
BOE Gov Bailey Speaks	19-01-2022	19:45	GBP	-	-
TIC Long-Term Purchases	19-01-2022	02:30	USD	-	-

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