



19 Sep.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,531	(1.9) %	(0.8) %
BSE SENSEX	58,841	(1.8) %	(0.7) %
CNX BANK	40,777	(1.0) %	9.8 %
CNX MIDCAP	31,495	(2.8) %	4.5 %
CNX SMALLCAP	9,817	(2.6) %	(7.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,822	(0.5) %	(15.2) %
S&P 500	3,873	(0.7) %	(18.7) %
FTSE 100	7,237	(0.6) %	(3.6) %
HANG SENG	18,762	(0.9) %	(19.4) %
NIKKEI	27,568	(1.1) %	(5.9) %
SHANGHAI COMPOSITE	3,126	(2.3) %	(13.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	79.59	0.2 %	7.0 %
EUR/USD	1.00	(0.0) %	(12.2) %
GBP/USD	1.15	(0.3) %	(15.0) %
USD/JPY	143.43	0.0 %	24.6 %
USD/AUD	1.49	0.1 %	8.0 %
USD/SGD	1.41	0.2 %	4.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	85	0.0 %	10.5 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,684	0.8 %	(7.2) %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,259	(0.6) %	(19.8) %
Copper(USD/MT)	7,792	(0.2) %	(19.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	3.5	0.0 %	1.8 %

Global Economy: A report released by the University of Michigan on Friday showed a modest improvement in U.S. consumer sentiment in the month of September. Consumer sentiment index inched up to 59.5 in September from 58.2 in August. The modest increase by the headline index came as the index of consumer expectations climbed to 59.9 in September from 58.0 in August. The current economic conditions index also showed a slight increase, creeping up to 58.9 in September from 58.6 in August. One-year inflation expectations dipped to 4.6 percent in September from 4.8 percent in August, while five-year inflation expectations edged down to 2.8 percent from 2.9 percent. The services sector in New Zealand continued to expand in August, and at a much faster pace, the latest survey from BusinessNZ revealed on Monday with a Performance of Services Index score of 58.6. That's up from the upwardly revised 54.4 reading in July (originally 51.2) and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. UK retail sales declined more than expected in August as the cost of living crisis weighed on consumer spending, official data showed. The retail sales volume declined 1.6 percent month-on-month, in contrast to July's revised 0.4 percent increase, the Office for National Statistics reported. The monthly fall in sales volumes was the strongest so far this year and joint largest fall since July 2021 when all legal restrictions on hospitality were lifted. On a yearly basis, retail sales decreased for the fifth straight month in August. Sales decreased 5.4 percent, following July's 3.2 percent fall.

Global Indices: The Dow fell 139.40 points or 0.5 percent to 30,822.42, the Nasdaq slumped 103.95 points or 0.9 percent to 11,448.40 and the S&P 500 slid 28.02 points or 0.7 percent to 3,873.33.

Indian Economy: According to a media statement published by the Gem & Jewellery Export Promotion Council (GJEPC), India's gem and jewellery exports increased by 4.4% from April-August of FY23 to US\$ 16,695.56 million, up from US\$ 15,991.68 million in the same time last year. However, gem and jewellery exports fell 0.54% to US\$ 3,316.08 million in August 2022, compared to US\$ 3,334.12 million at the same time last year. The dip in the overall gem and jewellery exports in August was caused by a drop in cut and polished diamond exports.

Equity Market: The barometer index, the S&P BSE Sensex, slumped 1,093.22 points or 1.82% to 58,840.79. The Nifty 50 index crashed 346.55 points or 1.94% to 17,530.85. In three consecutive sessions, the Sensex has slipped 2.86% while the Nifty has tumbled 2.98%.

Corporate News: Maruti Suzuki India has announced to recall 5,002 Super Carry vehicles manufactured between 4th May 2022 and 30th July 2022. The recall is being undertaken for inspection and torquing of a bolt attached to seat belt buckle bracket of co-driver seat. It is suspected that there is a possible defect in bolt torquing, which in a rare case, may loosen in the long run. Shree Renuka Sugars said that the expanded capacity for ethanol production, from 720 KLPD to 1250 KLPD, is expected to go on stream by December 2022.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(85.4)	89.5	(57.8)
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)	101,067	68,959	55,593
F&O(INR cr)	9,404,204	14,914,245	11,661,623

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.3	25.4	25.7
NSE VIX	19.8	18.8	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	40,777	(1.0) %	9.8 %	Energy	27,729	(1.6) %	4.8 %
IT	26,706	(3.7) %	(26.5) %	Pharma	12,347	(1.4) %	(9.1) %
Metals	6,138	(2.0) %	(5.2) %	Finance	18,372	(1.5) %	5.2 %
Auto	12,954	(2.7) %	21.3 %	PSU	3,152	(2.3) %	11.2 %
FMCG	43,193	(1.9) %	17.7 %	Real Estate	454	(3.7) %	(4.3) %

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>
IndusInd B	1,227	2.6 %	26.7 %	Vedanta	291	(7.5) %	(28.4) %
FSN E-Comm	1,355	1.5 %	(20.0) %	DLF	389	(5.3) %	0.8 %
Cipla	1,044	1.0 %	2.8 %	UPL	703	(5.3) %	(10.0) %
GAIL (Indi	92	0.8 %	(14.9) %	Bandhan Ba	289	(5.2) %	(9.8) %
Indus Towe	204	0.2 %	(7.7) %	Tata Consu	795	(5.0) %	0.7 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
IPPI m/m	19-09-2022	18:00	CAD	-	(0.021)
Rightmove HPI m/m	19-09-2022	04:31	GBP	-	(0.013)
BusinessNZ Services Index	19-09-2022	04:00	NZD	-	51.2
RBNZ Gov Orr Speaks	19-09-2022	08:30	NZD	-	-
NAHB Housing Market Index	19-09-2022	19:30	USD	-	49

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