



20 Jan.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,938	(1.0) %	20.7 %
BSE SENSEX	60,099	(1.1) %	20.1 %
CNX BANK	38,041	(0.4) %	12.4 %
CNX MIDCAP	31,363	(0.1) %	30.0 %
CNX SMALLCAP	11,689	0.0 %	41.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,029	(1.0) %	(3.6) %
S&P 500	4,533	(1.0) %	(4.9) %
FTSE 100	7,590	0.4 %	1.1 %
HANG SENG	24,128	0.1 %	3.7 %
NIKKEI	27,467	(2.8) %	(6.3) %
SHANGHAI COMPOSITE	3,558	(0.3) %	(2.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.40	0.3 %	0.1 %
EUR/USD	1.14	(0.4) %	0.0 %
GBP/USD	1.36	(0.4) %	0.7 %
USD/JPY	114.67	0.1 %	(0.4) %
USD/AUD	1.39	0.3 %	1.1 %
USD/SGD	1.35	0.1 %	0.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	85	1.4 %	11.0 %
Gold(INR/10g)	48,070	0.3 %	(0.2) %
Gold Comex(USD/oz)	1,840	1.6 %	1.4 %
SILVER(INR/1Kg)	63,319	3.1 %	2.0 %
Aluminium(USD/MT)	2,806	(7.6) %	(0.3) %
Copper(USD/MT)	9,692	(1.1) %	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	1.9	(0.0) %	0.2 %

Global Economy: New residential construction in the U.S. unexpectedly saw a notable increase in the month of December, according to a report released by the Commerce Department on Wednesday. The report said housing starts jumped 1.4% to an annual rate of 1.702 million in December from a revised rate of 1.678 million in November. The Commerce Department also said building permits spiked by 9.1 percent to an annual rate of 1.873 million from a revised rate of 1.717 million in November. Germany's consumer price inflation rose to 5.3% in December from 5.2% in November, Destatis said on Wednesday. A higher inflation figure was last measure in June 1992, at 5.8%. Energy prices exceeded the level of the previous year by 18.3% in December. Excluding food and energy prices, inflation was 3.7%. EU harmonized inflation slowed to 5.7% in December, in line with estimate, from 6% in November. On a monthly basis, consumer prices were up 0.5%, as initially estimated. UK annual inflation rate jumped to 5.4% in December from 5.1% in November. It is the highest reading since March 1992 as inflationary pressures persist, namely surging demand, rising energy cost, supply chain disruptions and a low base effect from last year. On a monthly basis, consumer prices rose 0.5%, following a 0.7% increase in November. The Consumer Sentiment Index in Australia declined 2% on month to 102.2 in January, data on Wednesday showed. Consumers in states impacted by 'delta' lockdowns appear to have been less unsettled by the rapid spread of the omicron than those in states experiencing their first major wave of Covid infections. Westpac's survey showed consumers reported a significant improvement in their finances from a year ago, with the sub-index lifting 7.5% to a nine-month high of 95.6.

Global Equities: Some recovery emerged in equities as elevated commodity prices supported risk appetite.

Indian Economy: Crude oil production during December 2021 was 2509.98 TMT, which is 5.19% lower than target for the month and 1.81% lower than the production of December 2020. Cumulative crude oil production during April-December, 2021 was 22378.40 TMT, which is 4.47% and 2.63% lower than target for the period and production during corresponding period of last year respectively. Natural gas production during December 2021 was 2896.69 MMSCM, which is 19.45% higher than the production of December 2020 but 14.93% lower than the monthly target. Cumulative natural gas production during April-December 2021 was 25673.90 MMSCM, which is 21.51% higher than production during corresponding period of last year but 8.75% lower when compared with target for the period.

Equity Markets: The key equity benchmarks ended with deep cuts after a week session on Wednesday. The Nifty closed below the 17,950 mark. Shares across most sectors declined with IT, FMCG and private financials declining the most.

Corporate News: The government approved sanction of Rs 973.74 crore to State Bank of India (SBI) as reimbursement related to loan moratorium that was implemented in 2020 amid the pandemic. TVS Motor Company has globally announced the launch of its motorcycle TVS Star HLX 150 Disc Variant in Egypt. Bajaj Auto posted a 22% fall in net profit to Rs 1214 crore on 1% rise in revenue from operations to Rs 9022 crore in Q3 FY22 over Q3 FY21. Larsen & Toubro Infotech posted 11% rise in consolidated net income to Rs 612.5 crore on 9.8% rise in revenue to Rs 4137.60 crore in Q3 FY22 over Q2 FY22.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(80.2)	(24.8)	(20.0)
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)	73,789	42,919	66,175
F&O(INR cr)	10,619,316	8,371,316	6,117,995

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.9	0	18.6
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	38,041	(0.4) %	12.4 %	Energy	25,294	1.0 %	36.6 %
IT	37,282	(2.1) %	43.5 %	Pharma	13,683	(0.1) %	10.5 %
Metals	5,801	0.8 %	38.5 %	Finance	18,270	(1.1) %	14.8 %
Auto	11,681	0.7 %	16.6 %	PSU	2,802	2.2 %	26.5 %
FMCG	37,106	(1.1) %	6.4 %	Real Estate	502	(0.1) %	49.5 %

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>
Biocon	367	5.3 %	(10.5) %	Info Edg.(5,017	(6.2) %	17.7 %
O N G C	170	3.9 %	63.2 %	ICICI Pru	574	(5.6) %	29.1 %
Bank of Ba	96	3.9 %	26.8 %	Indraprast	439	(3.3) %	(16.7) %
GAIL (Indi	148	3.5 %	5.6 %	Infosys	1,867	(2.8) %	34.8 %
Indus Towe	271	3.5 %	6.0 %	Shree Ceme	26,402	(2.8) %	(11.9) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
MI Inflation Expectations	20-01-2022	05:30	AUD	-	0.048
Employment Change	20-01-2022	06:00	AUD	-	-
ADP Non-Farm Employment Change	20-01-2022	19:00	CAD	-	-
German PPI m/m	20-01-2022	12:30	EUR	-	0.008
Final CPI y/y	20-01-2022	15:30	EUR	-	0.05
ECB Monetary Policy Meeting Accounts	20-01-2022	18:00	EUR	-	-
RICS House Price Balance	20-01-2022	05:31	GBP	-	0.71
Trade Balance	20-01-2022	05:20	JPY	-	-
FPI m/m	20-01-2022	03:15	NZD	-	(0.006)
Existing Home Sales	20-01-2022	20:30	USD	-	-
Natural Gas Storage	20-01-2022	21:00	USD	-	-
Crude Oil Inventories	20-01-2022	21:30	USD	-	-

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