



20 Sep.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,585	(0.3) %	18.3 %
BSE SENSEX	59,016	(0.2) %	18.0 %
CNX BANK	37,812	0.4 %	11.7 %
CNX MIDCAP	29,899	(1.3) %	24.0 %
CNX SMALLCAP	10,788	(0.7) %	30.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,585	(0.5) %	13.0 %
S&P 500	4,433	(0.9) %	18.0 %
FTSE 100	6,964	(0.9) %	6.0 %
HANG SENG	24,921	1.0 %	(9.3) %
NIKKEI	30,500	0.6 %	11.9 %
SHANGHAI COMPOSITE	3,614	0.2 %	3.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.38	(0.1) %	0.6 %
EUR/USD	1.18	(0.3) %	(4.0) %
GBP/USD	1.38	(0.1) %	1.2 %
USD/JPY	109.52	0.1 %	6.2 %
USD/AUD	1.37	0.2 %	5.5 %
USD/SGD	1.34	0.1 %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	72	(0.9) %	51.1 %
Gold(INR/10g)	46,178	(0.5) %	(9.5) %
Gold Comex(USD/oz)	1,768	0.5 %	(9.3) %
SILVER(INR/1Kg)	61,067	(1.6) %	(11.3) %
Aluminium(USD/MT)	2,915	1.6 %	44.8 %
Copper(USD/MT)	9,436	0.5 %	19.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.4	0.0 %	0.4 %

Global Economy: Consumer sentiment in the US has seen a modest improvement in September after falling sharply in August, according to a preliminary report released by the University of Michigan on Friday. The report said the consumer sentiment index edged up by 71.0 in September from 70.3 in August. Eurozone's construction output gained 0.1% month-on-month in July, after a 0.6% decrease in June, data from Eurostat showed on Friday. Production in building construction increased 0.4% monthly in July, while output in civil engineering declined 1.7%. On a year-on-year basis, the construction output gained 3.3% in July, after a 4.1% growth in the prior month. UK retail sales including auto fuel dropped by 0.9% month-on-month in August after declining 2.8% in July, data from the Office for National Statistics showed on Friday. Excluding auto fuel, the retail sales volume decreased at a slower pace of 1.2% following a 3.2% drop in July. The Japanese economy remains in picking up, although the pace has weakened in a severe situation due to the Novel Coronavirus, the Cabinet Office said in its September report. The government lowered its assessment of both private spending and industrial production. The Cabinet Office said private consumption shows weakness further and industrial production is picking up, although some weakness is seen recently. Further, the government repeated that business investment is picking up and exports continue to increase moderately.

Global Equities: The US stocks stayed under pressure on Friday with the DOW sliding around half a percent.

Indian Economy: Finance Minister Nirmala Sitharaman chaired the 45th Goods and Services Tax (GST) Council meeting today in Lucknow where the council discussed bringing petrol and diesel under the GST but decided against putting petrol and diesel under GST. The minister also announced that concessional GST rates on Covid-19 related medicines which were applicable till September 30, have extended till December 31, 2021. GST rate on biodiesel for blending with diesel cut from 12% to 5%. GST Council agreed to correct inverted duty structure on footwear and textiles from Jan 1, 2022. The E-commerce operators will have to pay GST on restaurant service supplied through them. FM Sitharaman also said a group of state ministers (GoM) is set to look at rate rationalisation related issues.

Equity Markets: Local equity indices snapped three day streak and ended with small losses on Friday. The Nifty closed below the 17,600 mark amid selling pressure in metals, realty and PSU bank stocks. Media and financial stocks bucked weak market trend.

Corporate News: Heavy selling in COMEX Copper could keep metal stocks under pressure in local markets. A 1% drop in Copper took the red metal to one week low on Friday. HLE Glascoat signed definitive agreements to acquire the global business of Thaletec GmbH, Germany as well as its subsidiary Thaletec USA, as a part of its strategy to strengthen its position further in the global markets with innovative technology. Zee Entertainment Enterprises will be in focus as BlackRock Inc. (on behalf of discretionary management clients) picked more than 3.01 lakh equity shares in the company via open market transaction, increasing shareholding to 5.01% from 4.98% earlier.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	250.5	104.9	11.1
MF(INR cr)	445.5	271.1	428.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	111,501	72,557	70,619
F&O(INR cr)	5,853,615	6,512,839	5,117,326

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.7	18.0	17.8
NSE VIX	15.2	14.4	16.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	37,812	0.4 %	11.7 %	Energy	21,445	(1.0) %	15.8 %
IT	35,647	(0.6) %	37.2 %	Pharma	14,355	(0.9) %	16.0 %
Metals	5,684	(2.4) %	35.7 %	Finance	18,476	0.7 %	16.1 %
Auto	10,351	0.0 %	3.3 %	PSU	2,467	(3.0) %	11.4 %
FMCG	40,799	(0.5) %	17.0 %	Real Estate	414	(2.3) %	23.2 %

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>
Interglobe	2,196	10.9 %	35.8 %	Yes Bank	13	(9.9) %	(15.6) %
Kotak Mah.	2,008	5.3 %	11.3 %	Adani Tran	1,820	(5.0) %	82.2 %
Avenue Sup	4,240	3.8 %	45.6 %	Punjab Nat	40	(4.9) %	4.1 %
Dabur Indi	654	2.1 %	21.4 %	Info Edg.(6,615	(3.6) %	55.2 %
Bajaj Hold	4,399	1.8 %	31.8 %	Tata Steel	1,386	(3.5) %	60.6 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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