



20 Sep.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,622	0.0 %	(0.3) %
BSE SENSEX	59,141	0.5 %	(0.2) %
CNX BANK	40,904	0.0 %	10.1 %
CNX MIDCAP	31,504	0.0 %	4.5 %
CNX SMALLCAP	9,724	0.0 %	(8.4) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	31,020	0.6 %	(14.6) %
S&P 500	3,900	0.7 %	(18.2) %
FTSE 100	7,237	(0.6) %	(3.6) %
HANG SENG	18,566	(1.0) %	(20.2) %
NIKKEI	27,568	(1.1) %	(5.9) %
SHANGHAI COMPOSITE	3,116	(0.4) %	(14.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	79.52	0.2 %	6.9 %
EUR/USD	1.00	0.3 %	(11.9) %
GBP/USD	1.14	(1.1) %	(15.6) %
USD/JPY	142.98	(0.3) %	24.2 %
USD/AUD	1.49	0.3 %	8.2 %
USD/SGD	1.41	0.1 %	4.2 %

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: Homebuilder confidence in the U.S. declined for the ninth consecutive month in September, according to a report released by the National Association of Home Builders. The report showed the NAHB/Wells Fargo Housing Market Index slid to 46 in September from 49 in August. The current sales conditions index dropped fell to 54 in September from 57 in August, while the sales expectations in the next six months index and the traffic of prospective buyers index both edged down by one point to 46 and 31, respectively. Eurozone construction output rose 0.3 percent month-over-month in July, reversing a 1.2 percent decrease in June, which was revised from the 1.3 percent fall seen in the previous estimate, preliminary data from Eurostat showed. Production in the building sector made a positive contribution of 0.3 percent, while civil engineering activity contracted 0.6 percent, though at a slower rate than a month ago. On a yearly basis, growth in construction output improved to 1.5 percent in July from 1.3 percent in June. Overall consumer prices in Japan were up 3.0 percent on year in August, the Ministry of Internal Affairs and Communications reported. Core CPI, which excludes volatile food prices, climbed an annual 2.8 percent. The People's Bank of China injected CNY 10 billion via 14-day reverse repos at an interest rate of 2.15 percent compared to the previous 2.25 percent. The bank also conducted CNY 2 billion repo operations at an unchanged rate of 2.00 percent, in a series of measures undertaken to support a slowing economy.

Global Indices: The Dow rose 197.26 points or 0.6 percent to 31,019.68, the Nasdaq advanced 86.62 points or 0.8 percent to 11,535.02 and the S&P 500 climbed 26.56 points or 0.7 percent to 3,899.89.

Indian Economy: Direct tax collections continue to grow at a robust pace, a clear indicator of the revival of economic activity post pandemic, as also the result of the stable policies of the Government, focusing on simplification and streamlining of processes and plugging of tax leakage through effective use of technology. The figures of Direct Tax collections for the FY 2022-23, as on 17.09.2022 show that net collections are at Rs 7,00,669 crore, compared to Rs 5,68,147 crore in the corresponding period of the preceding Financial Year i.e. FY 2021-22, representing an increase of 23%.

Equity Market: The barometer index, the S&P BSE Sensex, rose 300.44 points or 0.51% to 59,141.23. The Nifty 50 index added 91.40 points or 0.52% to 17,622.25. In past three trading sessions, the Sensex has slipped 2.86% while the Nifty has tumbled 2.98%.

Corporate News: Ircon International (IRCON) has been awarded the work of Stage-III i.e. Detailed Engineering and Project Management Consultancy (PMC) Services for 'Development of Rail Infrastructure for proposed 02 nos. RLS (20 MTY) for Ananta OCP of Jagannath Area at Talcher' by Mahanadi Coalfields Limited (MCL) at total value of Rs.256 crore. Adani Enterprises has raised Rs. 100 crore by allotment of 1,000 Rated, Listed, Secured, Redeemable, Principal Protected Market Linked Non-Convertible Debentures (MLD) of the face value of Rs. 10,00,000 - each on private placement basis.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(435.6)	45.8	(61.2)
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)	75,124	69,433	55,762
F&O(INR cr)	9,344,009	14,485,766	11,641,470

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	26.3	25.4	25.7
NSE VIX	19.9	18.9	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	40,904	0.3 %	10.1 %	Energy	27,587	(0.5) %	4.3 %
IT	26,810	0.4 %	(26.2) %	Pharma	12,370	0.2 %	(8.9) %
Metals	6,110	(0.4) %	(5.7) %	Finance	18,493	0.7 %	5.9 %
Auto	13,074	0.9 %	22.5 %	PSU	3,216	2.0 %	13.5 %
FMCG	43,656	1.1 %	18.9 %	Real Estate	450	(0.9) %	(5.2) %

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>
Ambuja Cem	565	9.3 %	85.2 %	Vedanta	282	(3.1) %	(30.6) %
M & M	1,289	3.1 %	55.9 %	Indus Towe	198	(3.1) %	(10.5) %
Bajaj Fina	7,496	3.1 %	1.2 %	Info Edg.(4,016	(2.6) %	(12.7) %
Bank of Ba	141	2.8 %	21.6 %	Tata Steel	103	(2.5) %	(21.7) %
SBI Life I	1,303	2.4 %	17.1 %	S A I L	79	(2.2) %	(22.8) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Monetary Policy Meeting Minutes	20-09-2022	07:00	AUD	-	-
CPI m/m	20-09-2022	18:00	CAD	-	0.001
Trade Balance	20-09-2022	11:30	CHF	-	-
SECO Economic Forecasts	20-09-2022	12:30	CHF	-	-
Current Account	20-09-2022	13:30	EUR	-	-
ECB President Lagarde Speaks	20-09-2022	22:30	EUR	-	-
National Core CPI y/y	20-09-2022	05:00	JPY	-	0.024

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