



21 Jan.2022

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,757	(1.0) %	19.4 %
BSE SENSEX	59,465	(1.1) %	18.9 %
CNX BANK	37,851	(0.5) %	11.8 %
CNX MIDCAP	31,312	(0.2) %	29.8 %
CNX SMALLCAP	11,684	(0.0) %	41.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,715	(0.9) %	(4.5) %
S&P 500	4,483	(1.1) %	(5.9) %
FTSE 100	7,585	(0.1) %	1.1 %
HANG SENG	24,952	3.4 %	7.2 %
NIKKEI	27,773	1.1 %	(5.2) %
SHANGHAI COMPOSITE	3,555	(0.1) %	(2.1) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.40	0.0 %	0.1 %
EUR/USD	1.13	(0.3) %	(0.3) %
GBP/USD	1.36	0.0 %	0.7 %
USD/JPY	114.43	(0.2) %	(0.6) %
USD/AUD	1.39	(0.2) %	0.9 %
USD/SGD	1.35	(0.0) %	(0.0) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	85	1.4 %	11.0 %
Gold(INR/10g)	48,535	1.0 %	0.8 %
Gold Comex(USD/oz)	1,840	1.6 %	1.4 %
SILVER(INR/1Kg)	64,356	1.6 %	3.7 %
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:** The US initial unemployment claims rose for a third straight week, coming in near the 300,000 level. Claims had reached a 52-year low of 188,000 in December, as many employers attempted to keep their existing workforces in the face of widespread labor shortages. The weekly new jobless claims jumped by the most since October in the latest reading to hit a three month low. Existing-home sales declined in December, snapping a streak of three straight months of gains, according to the National Association of Realtors. Each of the four major US regions witnessed sales fall in December from both a month-over-month and a year-over-year basis. Despite the drop, overall sales for 2021 increased 8.5%. China cut its benchmark lending rates for corporate and household loans for a second straight month at its January fixing on Thursday, while lowering a mortgage reference rate for the first time in nearly two years. The one-year loan prime rate (LPR) was lowered by 10 basis points to 3.70% from 3.80% and the five-year LPR was reduced by 5 basis points to 4.60% from 4.65%. The cut to the five-year LPR was the first reduction since April 2020. Germany's producer prices grew 24.2% year-on-year in December driven by higher energy prices, after rising 19.2% in November, Destatis reported Thursday. This was the strongest year-on-year increase since the survey began in 1949. On a monthly basis, producer price inflation advanced to 5% from 0.8% in November. Japan posted a merchandise trade deficit of 582.2 billion yen in December, the Ministry of Finance said on Thursday, following the downwardly revised deficit of 955.6 billion yen in November (originally -954.8 billion yen). Exports climbed 17.5% on year, following the 20.5% increase in the previous month. Imports were up 41.1% on year, down from 43.8% a month earlier. For all of 2021, imports rose 24.3% and exports gained 21.5% for a trade deficit of 1.472 trillion yen.

**Global Equities:** The US stocks moved up amid bargain buying after recent losses. Global risk sentiment was supported on easy Chinese monetary policy cues.

**Indian Economy:** Union Minister for Finance & Corporate Affairs Nirmala Sitharaman has authorised the release of an advance installment of tax devolution to State Governments amounting to Rs 47,541 crore. This is in addition to the regular devolution for the month of January 2022, also being released. States would receive a total of Rs 95,082 crore or double their respective entitlement during the month of January 2022. State-wise break-up of the amounts being released is appended.

**Equity Markets:** The domestic equity benchmarks ended with deep cuts on Thursday. After hitting the day's low at 17,648.45, the Nifty managed to pare some losses as it closed above the 17,750 mark. IT, FMCG, pharma and healthcare stocks tumbled. Metals and realty shares bucked weak market trend.

**Corporate News:** Hindustan Unilever reported higher profit at Rs 2,243 crore in Q3FY22 against Rs 1,921 crore in Q3FY21, revenue jumped to Rs 13,092 crore from Rs 11,862 crore YoY. Container Corporation of India reported higher consolidated profit at Rs 283.39 crore in Q3FY22 against Rs 233.07 crore in Q3FY21, revenue jumped to Rs 1,938.03 crore from Rs 1,766.89 crore YoY. Havells India reported lower consolidated profit at Rs 305.82 crore in Q3FY22 against Rs 350.14 crore in Q3FY21, revenue jumped to Rs 3,664.21 crore from Rs 3,175.2 crore YoY.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(353.7)	(50.1)	(21.7)
MF(INR cr)	1,390.3	394.9	548.4

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	68,199	44,725	66,185
F&O(INR cr)	18,625,229	9,103,739	6,180,220

## 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	37,851	(0.5) %	11.8 %	Energy	25,270	(0.1) %	36.5 %
IT	36,662	(1.7) %	41.1 %	Pharma	13,455	(1.7) %	8.7 %
Metals	5,831	0.5 %	39.2 %	Finance	18,138	(0.7) %	14.0 %
Auto	11,583	(0.8) %	15.6 %	PSU	2,795	(0.2) %	26.2 %
FMCG	36,681	(1.1) %	5.2 %	Real Estate	503	0.2 %	49.8 %

## 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>
Cholaman.I	649	6.1 %	15.4 %	Bajaj Fins	17,259	(4.5) %	76.3 %
Power Grid	215	4.9 %	30.9 %	Bajaj Auto	3,309	(3.7) %	(11.6) %
Apollo Hos	4,645	2.9 %	60.5 %	Godrej Con	903	(3.7) %	24.3 %
Jindal Ste	418	2.2 %	12.8 %	Divi's Lab	4,330	(3.4) %	19.7 %
Bharti Air	715	1.7 %	39.9 %	ICICI Lomb	1,386	(2.6) %	(3.6) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Core Retail Sales m/m	21-01-2022	19:00	CAD	-	0.013
Consumer Confidence	21-01-2022	20:30	EUR	-	(8)
GfK Consumer Confidence	21-01-2022	05:31	GBP	-	(15)
Retail Sales m/m	21-01-2022	12:30	GBP	-	0.014
MPC Member Mann Speaks	21-01-2022	18:30	GBP	-	-
National Core CPI y/y	21-01-2022	05:00	JPY	-	0.005
Monetary Policy Meeting Minutes	21-01-2022	05:20	JPY	-	-
BusinessNZ Manufacturing Index	21-01-2022	03:00	NZD	-	50.6
Visitor Arrivals m/m	21-01-2022	03:15	NZD	-	0.596

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