



21 Sep.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,451	0.3 %	17.4 %
BSE SENSEX	58,491	(0.9) %	17.2 %
CNX BANK	37,238	0.2 %	10.0 %
CNX MIDCAP	29,290	0.1 %	21.4 %
CNX SMALLCAP	10,597	(0.0) %	27.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,970	(1.8) %	11.0 %
S&P 500	4,358	(1.7) %	16.0 %
FTSE 100	6,904	(0.9) %	5.1 %
HANG SENG	24,099	(3.3) %	(12.3) %
NIKKEI	30,500	0.6 %	11.9 %
SHANGHAI COMPOSITE	3,614	0.2 %	3.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.47	0.1 %	0.7 %
EUR/USD	1.17	(0.8) %	(4.4) %
GBP/USD	1.37	(0.7) %	0.6 %
USD/JPY	110.00	0.5 %	6.6 %
USD/AUD	1.38	0.8 %	6.1 %
USD/SGD	1.35	0.6 %	2.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	(2.3) %	47.6 %
Gold(INR/10g)	46,149	(0.1) %	(9.5) %
Gold Comex(USD/oz)	1,767	(0.1) %	(9.4) %
SILVER(INR/1Kg)	59,920	(1.9) %	(13.0) %
Aluminium(USD/MT)	2,847	(2.3) %	41.4 %
Copper(USD/MT)	9,146	(3.1) %	15.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.3	(0.1) %	0.4 %

Global Economy: The US builder confidence inched up in September on lower lumber prices and strong housing demand, even as the housing sector continues to grapple with building material supply chain issues and labor challenges. Ending a three-month decline, builder sentiment in the market for newly built single-family homes edged up one point to 76 in September, according to the NAHB/Wells Fargo Housing Market Index (HMI) released today. Germany's producer prices increased in August at the fastest pace since 1974, data from Destatis revealed on Monday. Producer price inflation rose to 12% in August from 10.4% in July. This was the biggest growth since December 1974, when prices were up 12.4% amid the first oil crisis. On a monthly basis, producer prices advanced 1.5%, but slower than the 1.9% increase seen in July. Excluding energy, producer prices grew 8.3%. The annual growth was largely driven by the 24% increase in energy prices. Intermediate goods prices climbed 17.1%. The average price of property coming to the UK housing market hit a new all-time high in September despite the traditional summer holiday lull, data from property website Rightmove showed on Monday. The average asking price was GBP 338,462. The Hong Kong economy grew as initially estimated in the second quarter, the Census and Statistics Department said Monday. Gross domestic product increased 7.6% in real terms in the second quarter over a year earlier, compared with the 8% expansion in the first quarter.

Global Equities: The US stocks tanked amid heavy volatility as investors mulled the broader implications of a liquidity crisis at China Evergrande Group. Major indices lost around 3%.

Indian Economy: India improved its ranking by two places and stood at 46 on the Global Innovation Index 2021 on the back of a vibrant start-up ecosystem and research by public and private organisations, NITI Aayog said. Formal job creation picked up pace in July as more and more industries and markets opened up on relaxed curbs. Payroll data by the Employees Provident Fund Organisation shows 1.46 million net new subscribers were added to the retirement fund body in July, the highest in the fiscal so far. The net new enrollments in July are 31.28% higher than June when 1.11 million net new subscribers were added to EPFO.

Equity Markets: The domestic equity benchmarks ended near the day's low as they witnessed heavy sell off on Monday. The Nifty closed below the 17,400 mark. Barring FMCG, shares across sectors declined with metals, banks, autos and financials declining the most.

Corporate News: Stocks linked to crude oil will be in focus as the WTI futures tanked more than 2% amid a wild sell off in industrial assets. HCL Technologies announced a five-year, digital transformation deal with MKS Instruments Inc a global provider of instruments, systems, subsystems, and solutions for advanced manufacturing processes, to improve performance, productivity, and speed to market. Shares of SBI Cards and Payment Services will be in focus. CA Rover Holdings, an affiliate of Carlyle Asia may reportedly sell 3.2 crore shares in the company through a block trade. Shares are being offered at Rs 1,021 to Rs 1,072.3 each. Zydus Healthcare, a wholly owned subsidiary of Cadila Healthcare has entered into an agreement with Integrace Private Limited ('Purchaser') to sell two brands viz. Mifegest and Cytolog.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	244.4	116.5	13.2
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)	6,495	67,052	70,061
F&O(INR cr)	5,607,377	6,443,188	5,121,550

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	20.8	18.2	17.8
NSE VIX	17.5	14.6	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	37,146	(1.8) %	9.7 %	Energy	21,213	(1.1) %	14.6 %
IT	35,400	(0.7) %	36.3 %	Pharma	14,097	(1.8) %	13.9 %
Metals	5,309	(6.6) %	26.7 %	Finance	18,178	(1.6) %	14.3 %
Auto	10,203	(1.4) %	1.8 %	PSU	2,363	(4.2) %	6.7 %
FMCG	41,170	0.9 %	18.1 %	Real Estate	405	(2.1) %	20.5 %

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>
Hind. Unil	2,800	2.9 %	16.7 %	Tata Steel	1,253	(9.6) %	45.2 %
Avenue Sup	4,356	2.7 %	49.5 %	NMDC	136	(7.7) %	(1.8) %
Bajaj Hold	4,483	1.9 %	34.3 %	JSW Steel	633	(7.2) %	24.5 %
ICICI Lomb	1,628	1.5 %	13.3 %	Hindalco I	444	(6.1) %	26.9 %
Marico	567	1.3 %	39.3 %	Vedanta	287	(5.1) %	23.9 %

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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