



21 Sep.2022

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,816	1.1 %	0.8 %
BSE SENSEX	59,720	1.0 %	0.7 %
CNX BANK	41,468	1.4 %	11.6 %
CNX MIDCAP	31,956	1.4 %	6.0 %
CNX SMALLCAP	9,832	1.1 %	(7.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,706	(1.0) %	(15.5) %
S&P 500	3,856	(1.1) %	(19.1) %
FTSE 100	7,193	(0.6) %	(4.2) %
HANG SENG	18,781	1.2 %	(19.3) %
NIKKEI	27,688	0.4 %	(5.5) %
SHANGHAI COMPOSITE	3,122	0.2 %	(14.0) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	79.52	(0.1) %	6.9 %
EUR/USD	1.00	0.3 %	(11.9) %
GBP/USD	1.14	(0.7) %	(15.6) %
USD/JPY	142.98	(0.3) %	24.2 %
USD/AUD	1.49	0.2 %	8.2 %
USD/SGD	1.41	(0.1) %	4.2 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	86	0.7 %	11.4 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,685	0.0 %	(7.1) %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,232	(1.2) %	(20.7) %
Copper(USD/MT)	7,772	(0.3) %	(19.5) %

**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 %	1.9 %

**Global Economy:** The Commerce Department released a report showing an unexpected spike in new residential construction in the U.S. in the month of August, although the report also showed a steeper than expected slump in building permits. The report showed housing starts soared by 12.2 percent to an annual rate of 1.575 million in August after plunging by 10.9 percent to a revised rate of 1.404 million in July. The unexpected bounce-back by housing starts came as multi-family starts skyrocketed by 28.0 percent to an annual rate of 640,000, while single-family starts jumped by 3.4 percent to an annual rate of 935,000. Meanwhile, the Commerce Department said building permits plunged by 10.0 percent to an annual rate of 1.517 million in August after slipping by 0.7 percent to a revised rate of 1.685 million in July. The euro area current account balance showed the biggest deficit since late 2008, data published by the European Central Bank showed. The current account registered an unexpected deficit of EUR 19.86 billion in July, in contrast to a surplus of EUR 4.24 billion in June. In twelve months to July, the current account surplus totaled EUR 63 billion or 0.5 percent of euro area GDP, down from EUR 370 billion or 3.1 percent a year earlier. The People's Bank of China retained its five-year loan prime rate, or LPR, the benchmark for mortgage rates, at 4.30 percent. The one-year loan prime rate was left unchanged at 3.65 percent after cutting it by 5 basis points in August.

**Global Indices:** The Dow tumbled 313.45 points or 1.0 percent to 30,706.23, the Nasdaq slumped 109.97 points or 1.0 percent to 11,425.05 and the S&P 500 dove 43.96 points or 1.1 percent to 3,855.93.

**Indian Economy:** As the fifth-largest beneficiary of FDI in the April-June quarter, India maintained its position as an appealing destination among a group of developed and developing countries, according to the Monthly Economic Report of the Department of Economic Affairs, Ministry of Finance. The report issued claims India received the fifth-highest amount of foreign direct investment (FDI) during the first quarter of 2022 among the defined group of developed and developing economies, thanks to a promising economic forecast, consistent progress in the ease of doing business, and helpful government policies. With FDI inflows of US\$ 16.1 billion, the pace continued into the second quarter of 2022 as well.

**Equity Market:** The barometer index, the S&P BSE Sensex, rose 578.51 points or 0.98% to 59,719.74. The Nifty 50 index added 194 points or 1.10% to 17,816.25.

**Corporate News:** Wipro and Finastra, a global provider of financial software applications and marketplaces, announced a partnership in India to help corporate banks accelerate digital transformation by deploying Finastra's leading solutions. Hero MotoCorp and HPCL have entered into a collaboration to establish charging infrastructure for Electric Vehicles (EVs) in the country. As a part of the initiative, the companies will set-up charging infrastructure for two-wheeled electric vehicles (EVs) across the country.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	91.9	49.3	(59.8)
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)	62,215	68,917	55,817
F&O(INR cr)	11,117,195	14,245,153	11,636,951

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	25.8	25.4	25.7
NSE VIX	18.8	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	41,468	1.4 %	11.6 %	Energy	27,724	0.5 %	4.8 %
IT	27,021	0.8 %	(25.7) %	Pharma	12,751	3.1 %	(6.1) %
Metals	6,206	1.6 %	(4.2) %	Finance	18,751	1.4 %	7.3 %
Auto	13,291	1.7 %	24.5 %	PSU	3,231	0.5 %	14.0 %
FMCG	43,981	0.7 %	19.8 %	Real Estate	457	1.6 %	(3.7) %

## 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>
Apollo Hos	4,559	5.8 %	1.2 %	Zomato Ltd	63	(1.7) %	(25.4) %
Cipla	1,092	5.4 %	7.6 %	One 97	697	(1.3) %	22.1 %
Lupin	671	4.7 %	(12.3) %	FSN E-Comm	1,325	(0.9) %	(21.8) %
Sun Pharma	912	4.2 %	0.4 %	Nestle Ind	18,617	(0.8) %	6.0 %
Interglobe	1,906	3.6 %	(4.7) %	I O C L	69	(0.8) %	(43.4) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
MI Leading Index m/m	21-09-2022	06:00	AUD	-	(0.002)
RBA Deputy Gov Bullock Speaks	21-09-2022	07:30	AUD	-	-
CB Leading Index m/m	21-09-2022	20:00	AUD	-	0.003
Gov Council Member Beaudry Speaks	21-09-2022	01:00	CAD	-	-
Public Sector Net Borrowing	21-09-2022	11:30	GBP	-	-
CBI Industrial Order Expectations	21-09-2022	15:30	GBP	-	(7)
Credit Card Spending y/y	21-09-2022	08:30	NZD	-	0.049
Existing Home Sales	21-09-2022	19:30	USD	-	-
FOMC Economic Projections	21-09-2022	23:30	USD	-	-

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