



21 Oct.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	18,267	(0.8) %	22.9 %
BSE SENSEX	61,260	(0.7) %	22.4 %
CNX BANK	39,518	(0.1) %	16.7 %
CNX MIDCAP	31,478	(2.2) %	30.5 %
CNX SMALLCAP	11,202	(2.4) %	35.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,609	0.4 %	16.3 %
S&P 500	4,536	0.4 %	20.8 %
FTSE 100	7,223	0.1 %	9.9 %
HANG SENG	26,136	1.4 %	(4.9) %
NIKKEI	29,256	0.1 %	7.3 %
SHANGHAI COMPOSITE	3,587	(0.2) %	2.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.17	0.4 %	3.0 %
EUR/USD	1.16	(0.0) %	(5.4) %
GBP/USD	1.37	(0.1) %	0.6 %
USD/JPY	114.28	0.0 %	10.8 %
USD/AUD	1.35	0.1 %	4.1 %
USD/SGD	1.35	0.0 %	2.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	84	1.1 %	76.1 %
Gold(INR/10g)	47,363	(0.1) %	(7.2) %
Gold Comex(USD/oz)	1,789	0.9 %	(8.2) %
SILVER(INR/1Kg)	64,276	0.8 %	(6.7) %
Aluminium(USD/MT)	3,065	(3.5) %	52.2 %
Copper(USD/MT)	10,161	(4.6) %	28.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	0.0 %	0.8 %

Global Economy: The US economy has recently grown at a modest to moderate rate, according to the Federal Reserve's Beige Book, although the pace of growth has slowed. The Beige Book attributed the slowdown to supply chain disruptions, labor shortages, and uncertainty around the Delta variant of COVID-19. China maintained its benchmark loan prime rates for the 18th consecutive month. The one-year loan prime rate was kept unchanged at 3.85% and the five-year LPR at 4.65%. The one-year and five-year loan prime rates were last lowered in April 2020. The one-year loan prime rate was cut by 20 basis points and five-year rate by 10 basis points in April 2020. Eurozone inflation rose as initially estimated in September, final data from Eurostat revealed on Wednesday. Inflation advanced to 3.4% in September from 3% in August. In the same period last year, prices were down 0.3%. The International Monetary Fund (IMF) has cut its 2021 economic growth forecast for Asia to 6.5%, down by 1.1 percentage points from its April projection, according to a newly released regional economic outlook. IMF noted that following the global financial crisis, Asia relied on large stimulus packages, which continued during Covid-19. UK consumer price inflation slowed slightly to 3.1% from 3.2% in August, the Office for National Statistics said Wednesday. Inflation remained well above the central bank's 2% target. On a monthly basis, the consumer price index gained 0.3%, following August's 0.7% increase. Core inflation that excludes energy, food, alcoholic beverages and tobacco, slowed to 2.9% from 3.1% in the previous month. Japan posted a merchandise trade deficit of 622.8 billion yen in September, the Ministry of Finance said on Wednesday, following the downwardly revised 637.2-billion-yen deficit in August (originally -635.4 billion yen). Exports climbed 13% on year following the 26.2% gain in the previous month. Imports were up an annual 38.6% slowing from 44.7% a month earlier.

Global Economy: The US stocks hit near record highs as good buying stayed in place amid broad dollar weakness and steady economic cues.

Indian Economy: Retail inflation for farm workers and rural labourers eased to 2.89% and 3.16%, respectively, in September, mainly due to lower prices of certain food items. Point-to-point rate of inflation based on the CPI-AL (Consumer Price Index-Agricultural Labourers and CPI-RL (Consumer Price Index-Rural Labourers) stood at 2.89% and 3.16% in September 2021 compared to 3.90% and 3.97% respectively in August 2021, the labour ministry said in a statement.

Equity Markets: The domestic equity benchmarks ended with significant cuts after a volatile session on Wednesday. The Nifty closed below the 18,250 mark. Metal, pharma, auto, FMCG and realty stocks declined while PSU banks and media shares bucked the trend.

Corporate News: Local oil marketing companies will be in focus as WTI Crude oil edged up above \$83 per barrel, extending recent multi year high run. L&T Finance Holdings reported lower consolidated profit at Rs 224.03 crore in Q2FY22 against Rs 265.12 crore in Q2FY21 while its revenue fell to Rs 3,051.82 crore from Rs 3,408.10 crore YoY. Tata Communications reported higher consolidated profit at Rs 425.38 crore in Q2FY22 against Rs 384.48 crore in Q2FY21 while its revenue fell to Rs 4,174 crore from Rs 4,401 crore YoY.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	6.5	45.8	13.0
MF(INR cr)	(421.3)	219.3	413.1

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	108,270	90,802	72,646
F&O(INR cr)	7,508,047	6,219,617	5,366,922

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.7	19.2	18.1
NSE VIX	18.3	16.6	16.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	39,518	(0.1) %	16.7 %	Energy	24,382	(1.6) %	31.7 %
IT	36,847	(0.7) %	41.8 %	Pharma	14,177	(1.4) %	14.5 %
Metals	5,974	(2.1) %	42.6 %	Finance	18,958	(0.6) %	19.2 %
Auto	11,493	(1.1) %	14.7 %	PSU	2,761	1.5 %	24.7 %
FMCG	39,696	(1.3) %	13.8 %	Real Estate	505	(2.2) %	50.4 %

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>
Bharti Air	708	4.0 %	38.6 %	Jubilant F	3,965	(8.4) %	34.4 %
Bank of Ba	92	3.2 %	22.0 %	P I Indust	3,055	(6.3) %	35.8 %
Indus Towe	303	2.7 %	18.6 %	Gland Phar	3,543	(5.2) %	43.6 %
St Bk of I	500	2.4 %	34.9 %	Siemens	2,211	(4.4) %	19.0 %
P & G Hygi	14,318	1.9 %	13.9 %	ICICI Pru	632	(4.2) %	42.2 %

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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