



22 Sep.2023

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	19,742	(0.8) %	13.5 %
BSE SENSEX	66,230	(0.9) %	12.1 %
CNX BANK	44,624	(1.7) %	9.3 %
CNX MIDCAP	40,185	(0.9) %	33.2 %
CNX SMALLCAP	12,444	(1.3) %	37.3 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,070	(1.1) %	2.8 %
S&P 500	4,330	(1.6) %	13.2 %
FTSE 100	7,679	(0.7) %	1.6 %
HANG SENG	17,655	(1.3) %	(12.4) %
NIKKEI	32,571	(1.4) %	26.7 %
SHANGHAI COMPOSITE	3,085	(0.8) %	(1.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.28	0.2 %	0.7 %
EUR/USD	1.07	0.3 %	(0.1) %
GBP/USD	1.24	0.0 %	2.5 %
USD/JPY	147.77	(0.1) %	12.7 %
USD/AUD	1.55	(0.3) %	5.7 %
USD/SGD	1.36	(0.0) %	1.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	90	(1.7) %	16.5 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,930	(0.2) %	4.9 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,202	1.3 %	(5.8) %
Copper(USD/MT)	8,277	0.5 %	(1.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	4.5	0.1 %	0.6 %

Global Economy: A report released by the Conference Board on Thursday showed its U.S. leading economic index decreased by 0.4 percent in August after dipping by a revised 0.3 percent in July. Meanwhile, the report said the coincident economic index rose by 0.2 percent in August following a 0.3 percent increase in July. The lagging economic index also improved by 0.2 percent in August after inching up by 0.1 percent in the previous month. The U.S. current-account deficit narrowed by \$2.4 billion, or 1.1 percent, to \$212.1 billion in the second quarter of 2023, according to statistics released today by the U.S. Bureau of Economic Analysis (BEA). In a close call, the Bank of England kept its benchmark rate unchanged unexpectedly for the first time since November 2021 as inflation eased to an 18-month low, while the economy is moving closer to a mild recession. The BoE Monetary Policy Committee decided to maintain the bank rate at 5.25 percent. The headline au Jibun Bank Flash Japan Manufacturing Purchasing Managers' Index (PMI) decreased from 49.6 in August to 48.6 in September, signaling a fourth consecutive deterioration in operating conditions that was the strongest since February. There were sustained decreases in both output and new orders, with the latter falling at the sharpest rate in seven months. The Judo Bank Flash Australia Composite PMI Output Index posted 50.2 in September, up from 48.0 in August. Climbing above the 50.0 no-change mark, the latest data indicated a return to expansion for Australia's private sector.

Global Indices: The Nasdaq plummeted 245.14 points or 1.8 percent to 13,223.98, the S&P 500 dove 72.20 points or 1.6 percent to 4,330.00 and the Dow tumbled 370.46 points or 1.1 percent to 34,070.42.

Indian Economy: The number of passengers carried by domestic airlines from January to August 2023 reached an impressive 1190.62 lakhs, marking a substantial increase of 38.27% compared to the same period last year, according to the Ministry of Civil Aviation. The month of August 2023 alone witnessed a significant monthly growth rate of 23.13%, with passenger numbers soaring to 148.27 lakhs.

Equity Market: The barometer index, the S&P BSE Sensex slipped 570.60 points or 0.85% to 66,230.24. The Nifty 50 index lost 159.05 points or 0.80% to 19,742.35. Both the indices corrected about 2.3% in the three consecutive sessions.

Corporate News: Infosys Finacle, part of EdgeVerve Systems, a wholly-owned subsidiary of Infosys and Nigeria's Guaranty Trust Bank (GTBank), the banking subsidiary of Guaranty Trust Holding Company Plc, announced that Guaranty Trust Bank has selected the Finacle Digital Banking Suite for its multi-country digital transformation program. NBCC (India) was awarded order for construction of various development work at township and mines of Bhilai steel plant, from SAIL. The value of the order is Rs 100 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(369.5)	(88.3)	161.1
MF(INR cr)	344.4	958.0	400.5

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	79,484	83,362	70,915
F&O(INR cr)	37,055,227	33,795,993	28,084,303

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.1	13.9	15.6
NSE VIX	10.8	11.1	11.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	44,624	(1.7) %	9.3 %	Energy	27,227	(0.8) %	19.4 %
IT	32,920	(0.1) %	15.0 %	Pharma	15,307	(1.0) %	26.8 %
Metals	6,807	(0.5) %	24.3 %	Finance	19,815	(1.4) %	9.1 %
Auto	16,200	(1.7) %	30.4 %	PSU	5,038	(2.3) %	34.2 %
FMCG	51,673	(0.5) %	13.0 %	Real Estate	565	(1.2) %	44.6 %

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>
Bajaj Hold	7,347	1.6 %	26.2 %	ICICI Pru	565	(3.9) %	29.0 %
Adani Port	831	1.6 %	32.4 %	M & M	1,583	(3.1) %	35.3 %
Adani Gree	1,023	1.4 %	22.2 %	Bank of Ba	207	(3.0) %	22.4 %
Tech Mahin	1,292	1.4 %	17.1 %	ICICI Bank	959	(2.8) %	8.5 %
Varun Beve	915	1.1 %	29.3 %	Cipla	1,206	(2.7) %	35.3 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Flash Manufacturing PMI	22-09-2023	04:30	AUD	-	49.6
Core Retail Sales m/m	22-09-2023	18:00	CAD	-	(0.008)
French Flash Manufacturing PMI	22-09-2023	12:45	EUR	-	46
German Flash Manufacturing PMI	22-09-2023	13:00	EUR	-	39.1
Flash Manufacturing PMI	22-09-2023	13:30	EUR	-	43.5
GfK Consumer Confidence	22-09-2023	04:31	GBP	-	(25)
Retail Sales m/m	22-09-2023	11:30	GBP	-	(0.012)
Flash Manufacturing PMI	22-09-2023	14:00	GBP	-	43
CBI Industrial Order Expectations	22-09-2023	15:30	GBP	-	(15)
National Core CPI y/y	22-09-2023	05:00	JPY	-	0.031
Flash Manufacturing PMI	22-09-2023	06:00	JPY	-	49.6
Westpac Consumer Sentiment	22-09-2023	02:30	NZD	-	83.1
Trade Balance	22-09-2023	04:15	NZD	-	-
Flash Manufacturing PMI	22-09-2023	19:15	USD	-	47.9

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