



22 Dec.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	16,771	0.9 %	12.8 %
BSE SENSEX	56,319	0.9 %	12.6 %
CNX BANK	34,608	0.5 %	2.2 %
CNX MIDCAP	29,208	1.3 %	21.1 %
CNX SMALLCAP	10,542	1.3 %	27.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,493	1.6 %	16.0 %
S&P 500	4,649	1.8 %	23.8 %
FTSE 100	7,297	1.4 %	11.0 %
HANG SENG	22,971	1.0 %	(16.4) %
NIKKEI	28,518	2.1 %	4.6 %
SHANGHAI COMPOSITE	3,625	0.9 %	3.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	75.87	(0.3) %	4.0 %
EUR/USD	1.12	(0.7) %	(8.4) %
GBP/USD	1.32	(0.4) %	(3.0) %
USD/JPY	113.72	(0.2) %	10.2 %
USD/AUD	1.40	0.8 %	8.2 %
USD/SGD	1.37	0.3 %	3.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	(3.7) %	43.3 %
Gold(INR/10g)	48,092	(0.6) %	(5.7) %
Gold Comex(USD/oz)	1,791	(0.6) %	(8.1) %
SILVER(INR/1Kg)	61,434	0.7 %	(10.8) %
Aluminium(USD/MT)	2,645	(1.8) %	31.4 %
Copper(USD/MT)	9,406	(1.2) %	18.8 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.4	0.0 %	0.5 %

Global Economy: The U.S. current account deficit surged to a 15-year high in the third quarter amid a record increase in imports as businesses rushed to replenish depleted inventories to meet strong demand. The US current account deficit came in at \$-214.8 billion versus \$205.5 billion estimate. Prior quarter figure was revised to a deficit of -\$198.3 billion versus -\$190.3 billion previously reported. The 3Q deficit was 3.7% of current dollar gross domestic product up from 3.5% in the second quarter. The \$16.5 billion widening of the current-account deficit in the third quarter reflected a reduced surplus on services and expanded deficits on secondary income and on goods that were partly offset by an expanded surplus on primary income. Exports of goods increased \$4.8 billion to \$441.6 billion mainly reflecting increasing is and industrial supplies materials, mostly natural gas and petroleum and products ending consumer goods, mostly medicinal, dental, and pharmaceutical products. Imports of goods increased \$10 billion to \$716.4 billion exported services. Eurozone's consumer confidence deteriorated for a third straight month to its weakest level since March, preliminary results of the monthly survey by the European Commission showed Tuesday. The flash consumer confidence indicator fell to -8.3 from -6.8 in November. German consumer confidence is set to fall sharply in January largely due to the restrictions imposed amid the fourth wave of the pandemic and rising inflation, survey results from the market research group GfK showed on Tuesday. The forward-looking consumer sentiment fell to -6.8 in January from -1.8 in December. The RBA Board decided to maintain the cash rate target at 10 basis points and the interest rate on Exchange Settlement balances at zero per cent and to continue to purchase government securities at the rate of \$4 billion a week until at least mid February 2022. The Board remained committed to maintaining highly supportive monetary conditions to achieve its objectives of a return to full employment and inflation consistent with the target.

Global Equities: The US stocks jumped impressively as a two week low mark triggered very good buying support for DOW.

Indian Economy: Domestic Crude oil production during November 2021 was 2431.44TMT, which is 6.89% lower than target for the month and 2.22% lower than the production of November 2020. Cumulative crude oil production during April-November, 2021 was 19868.42TMT, which is 4.38% and 2.74% lower than target for the period and production during corresponding period of last year respectively.

Equity Markets: The benchmark equity indices ended with strong gains on Tuesday on bargain hunting after a recent steep fall. The Nifty ended below the 16,800 mark after hitting the day's high of 16,936.40 in afternoon trade. All sectoral indices on the NSE ended in the green. Metal, media and IT stocks were in demand.

Corporate News: India Cements will be in focus as Radhakishan S Damani & Others acquired 2.03 percent stake in the company via open market transaction, increasing shareholding to 22.76 percent from 20.73 percent. IRB Infrastructure Developers subsidiary Chittoor Thachur Highway has now executed Concession Agreement with National Highways Authority of India. NTPC has planned to have a total renewable energy (RE) capacity of 35 gigawatts (GW) by 2027 and is expected to generate 10 billion units (BU) of green energy in 2022-23, Parliament was informed on Tuesday.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(403.2)	(114.7)	(19.9)
MF(INR cr)	914.5	1,347.4	533.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	7,517	47,990	69,919
F&O(INR cr)	7,039,313	7,678,596	5,900,728

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	22.9	23.5	18.5
NSE VIX	17.5	17.6	16.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,608	0.5 %	2.2 %	Energy	22,326	1.2 %	20.6 %
IT	36,627	2.0 %	41.0 %	Pharma	13,283	0.7 %	7.3 %
Metals	5,425	2.9 %	29.5 %	Finance	16,841	0.4 %	5.9 %
Auto	10,484	0.8 %	4.6 %	PSU	2,464	0.0 %	11.3 %
FMCG	36,337	0.7 %	4.2 %	Real Estate	460	1.6 %	37.0 %

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>
Indus Towe	253	6.2 %	(1.1) %	Power Grid	207	(1.5) %	26.0 %
Godrej Con	937	5.1 %	29.0 %	Bank of Ba	79	(1.5) %	4.4 %
Adani Tran	1,770	4.4 %	77.1 %	Axis Bank	666	(1.3) %	(6.6) %
Vedanta	337	4.2 %	45.7 %	Marico	491	(0.9) %	20.5 %
Piramal En	2,555	4.1 %	43.5 %	Bajaj Fina	6,578	(0.9) %	24.8 %

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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