



23 Sep.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,630	(0.5) %	(0.2) %
BSE SENSEX	59,120	(0.6) %	(0.3) %
CNX BANK	40,631	(1.4) %	9.4 %
CNX MIDCAP	31,826	0.3 %	5.6 %
CNX SMALLCAP	9,790	0.6 %	(7.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	30,077	(0.4) %	(17.2) %
S&P 500	3,758	(0.8) %	(21.2) %
FTSE 100	7,160	(1.1) %	(4.6) %
HANG SENG	18,148	(1.6) %	(22.0) %
NIKKEI	27,154	(0.6) %	(7.3) %
SHANGHAI COMPOSITE	3,109	(0.3) %	(14.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	79.62	0.0 %	7.1 %
EUR/USD	1.00	(0.0) %	(12.1) %
GBP/USD	1.14	0.1 %	(15.6) %
USD/JPY	143.54	0.2 %	24.7 %
USD/AUD	1.49	(0.0) %	8.4 %
USD/SGD	1.41	0.1 %	4.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	83	(1.2) %	7.7 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,672	(0.0) %	(7.9) %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,191	(2.4) %	(22.2) %
Copper(USD/MT)	7,762	(0.4) %	(19.7) %

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: Potentially signaling a recession, the Conference Board released a report on Thursday showing its index of leading U.S. economic indicators declined for the sixth consecutive month in August. The Conference Board said its leading economic index fell by 0.3 percent in August after sliding by a revised 0.5 percent in July. With the continued decrease, the LEI slumped by 2.7 percent over the six-month period between February and August, a reversal from the 1.7 percent jump over the previous six months. While the headline index continued to decline, the report showed the coincident economic index edged up by 0.1 percent in August after climbing by 0.5 percent in July. The Conference Board said the lagging economic index also increased by 0.7 percent in August after rising by 0.4 percent in July. The Bank of England raised the benchmark rate by a half percentage point on Thursday, defying expectations for a bigger move, as policymakers assessed that the UK economy has already landed in a recession. The Monetary Policy Committee decided to raise the bank rate by 50 basis points to 2.25 percent from 1.75 percent, in a three-way split vote. The manufacturing sector in Australia continued to expand in September, and at a fractionally higher pace, the latest survey from S&P Global revealed on Friday with a Manufacturing PMI score of 53.9. Production levels expanded for an eighth successive month in September and at the sharpest pace since April. Accelerated output growth reportedly stemmed from strengthening demand conditions within the sector.

Global Indices: The major averages all closed in negative territory, although the Dow posted a relatively modest loss. While the Dow dipped 107.10 points or 0.4 percent to 30,076.68, the S&P 500 shed 31.94 points or 0.8 percent to 3,757.99 and the Nasdaq tumbled 153.39 points or 1.4 percent to 11,066.81.

Indian Economy: The National Logistics Policy, which aims to lower transportation costs and boost the sector's overall performance, was adopted by the Government of India. According to a formal statement, the policy aims to lower logistics costs in India to levels comparable to international benchmarks by 2030, raise the country's position in the Logistics Performance Index from 44th in 2018 and develop a data-driven decision support system for a productive logistics ecosystem.

Equity Market: The barometer index, the S&P BSE Sensex, slipped 337.06 points or 0.57% to 59,119.72. The Nifty 50 index declined 88.55 points or 0.50% to 17,629.80.

Corporate News: Tata Steel has approved amalgamation of all metal companies of Tata group into Tata Steel. The companies that will be merged with Tata Steel are Tata Steel Long Products, The Tinplate Company of India, Tata Metaliks, TRF, The Indian Steel & Wire Products, Tata Steel Mining and S & T Mining Company. Cipla has received the Establishment Inspection Report (EIR) indicating closure of the inspection. The company had earlier informed about the product specific Preapproval Inspection (PAI) by the United States Food and Drug Administration (USFDA) at the Indore plant from 27th June 2022 to 1st July 2022.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(34.9)	55.5	(57.1)
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)	68,626	68,531	55,985
F&O(INR cr)	33,126,329	15,339,907	11,829,598

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.0	25.7	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	40,631	(1.4) %	9.4 %	Energy	27,223	(0.3) %	2.9 %
IT	26,783	(0.2) %	(26.3) %	Pharma	12,613	0.3 %	(7.1) %
Metals	6,101	0.4 %	(5.8) %	Finance	18,404	(1.4) %	5.4 %
Auto	13,321	0.7 %	24.8 %	PSU	3,180	(0.9) %	12.2 %
FMCG	45,080	1.3 %	22.8 %	Real Estate	450	(0.3) %	(5.2) %

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>
Adani Tran	3,998	3.4 %	65.1 %	Power Grid	220	(3.1) %	(2.2) %
Avenue Sup	4,432	2.9 %	8.6 %	Godrej Con	907	(2.2) %	20.4 %
Titan Comp	2,738	2.7 %	8.6 %	Axis Bank	789	(2.2) %	1.9 %
Marico	549	2.6 %	6.0 %	Muthoot Fi	1,014	(2.1) %	(25.1) %
Hind. Unil	2,693	2.6 %	29.6 %	HDFC Bank	1,486	(2.1) %	(1.3) %

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	23-09-2022	04:30	AUD	-	53.8
Core Retail Sales m/m	23-09-2022	18:30	CAD	-	0.008
SNB Chairman Jordan Speaks	23-09-2022	21:00	CHF	-	-
French Flash Services PMI	23-09-2022	12:45	EUR	-	51.2
German Flash Manufacturing PMI	23-09-2022	13:00	EUR	-	49.1
Flash Manufacturing PMI	23-09-2022	13:30	EUR	-	49.6
GfK Consumer Confidence	23-09-2022	04:31	GBP	-	(44)
Flash Manufacturing PMI	23-09-2022	14:00	GBP	-	47.3
CBI Realized Sales	23-09-2022	15:30	GBP	-	37
Flash Services PMI	23-09-2022	19:15	USD	-	43.7
Fed Chair Powell Speaks	23-09-2022	23:30	USD	-	-

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