



23 Nov.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,206	(1.2) %	15.7 %
BSE SENSEX	58,466	(2.0) %	15.9 %
CNX BANK	37,129	0.0 %	9.7 %
CNX MIDCAP	30,332	0.0 %	25.8 %
CNX SMALLCAP	10,734	0.0 %	29.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,602	(0.8) %	16.3 %
S&P 500	4,698	(0.1) %	25.1 %
FTSE 100	7,224	(0.5) %	9.9 %
HANG SENG	24,951	(0.4) %	(9.2) %
NIKKEI	29,774	0.1 %	9.2 %
SHANGHAI COMPOSITE	3,582	0.6 %	2.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.10	(0.2) %	1.6 %
EUR/USD	1.13	0.3 %	(7.5) %
GBP/USD	1.35	0.3 %	(1.2) %
USD/JPY	114.20	(0.3) %	10.7 %
USD/AUD	1.37	0.1 %	6.0 %
USD/SGD	1.36	(0.0) %	2.7 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	76	(3.9) %	59.5 %
Gold(INR/10g)	48,710	(0.7) %	(4.5) %
Gold Comex(USD/oz)	1,849	(0.9) %	(5.1) %
SILVER(INR/1Kg)	65,798	(0.7) %	(4.4) %
Aluminium(USD/MT)	2,661	1.3 %	32.2 %
Copper(USD/MT)	9,621	1.3 %	21.5 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	(0.0) %	0.6 %

**Global Economy:** Bundesbank, the German central bank noted in a latest update today that the global economic recovery lost significant momentum in the third quarter. Severe shortages of intermediate goods hindered economic activity in many regions. As the delta variant of the coronavirus spread, pandemic-induced burdens in some countries were also exacerbated again – a situation compounded yet further at times by other inhibiting factors. For instance, economic growth in China also slowed due to problems on the real estate market. In the United States, weather-induced production losses and the expiry of fiscal transfer payments were partly responsible for weaker growth. Recovery in the United Kingdom also continued at a substantially reduced pace. In the euro area, meanwhile, gross domestic product (GDP) saw renewed strong growth, but here, too, the recovery lost significant momentum over the course of the quarter. US President Joe Biden picked Federal Reserve Chair Jerome Powell to lead the central bank for a second term. China maintained its benchmark loan prime rates for the 19th consecutive month, as widely expected, on Monday. 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.

**Global Equities:** The S&P 500 and Nasdaq Composite retreated from all-time highs. However, Asian equities are mostly trading lower today.

**Indian Economy:** The Government has notified uniform goods and services tax rate at 12 % on MMF, MMF yarn, MMF fabrics and apparel that has addressed the inverted tax structure in the MMF textile value chain. The changed rates will come into effect from 1st January, 2022. The uniform rate of 12% for entire value chain of MMF textiles sector will be benefiting and save lot of working capital. It will reduce the compliance burden of the industry players. This is a welcome step by the Government with no inversion.

**Equity Markets:** The benchmark indices ended with sharp losses on Monday. In the broader market, the S&P BSE Mid-Cap index declined 2.62% while the S&P BSE Small-Cap index slipped 2.96%. The risk-off mood was triggered by fresh COVID-19 cases in Europe and lockdowns in countries like Austria. The dollar index climbing over 96 mark also spooked investors. Repeal of farms laws by the government, falling of Reliance-Aramco deal and the weak listing of Paytm also dented investors sentiment.

**Corporate News:** Quess Corp has increased its stake in Stellarslog Technovation from 36.58 percent to 49% by investing approximately Rs 4 crore. Post this transaction, Taskmo continues to remain an associate of Quess Corp. Triveni Engineering & Industries has signed a 10-year business agreement with GEAE Technology USA to locally manufacture the LM2500 gas turbine base and enclosure.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	316.2	244.8	12.4
MF(INR cr)	198.8	507.9	412.5

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	80,428	62,794	72,226
F&O(INR cr)	6,723,198	7,067,699	5,656,661

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.9	17.0	17.9
NSE VIX	17.5	16.0	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	37,129	(2.2) %	9.7 %	Energy	23,118	(2.8) %	24.9 %
IT	35,479	(1.5) %	36.6 %	Pharma	13,245	(1.8) %	7.0 %
Metals	5,422	(0.0) %	29.4 %	Finance	18,177	(2.3) %	14.3 %
Auto	11,380	(3.1) %	13.5 %	PSU	2,685	(4.5) %	21.3 %
FMCG	38,352	(1.3) %	10.0 %	Real Estate	505	(4.1) %	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>
Vedanta	328	6.1 %	42.0 %	Info Edg.(	6,072	(6.4) %	42.4 %
Bharti Air	742	3.9 %	45.2 %	Bajaj Fina	7,058	(5.7) %	33.9 %
Gland Phar	3,540	3.6 %	43.5 %	Bank of Ba	91	(5.6) %	20.2 %
Indus Towe	292	2.6 %	14.3 %	O N G C	147	(5.0) %	40.4 %
Piramal En	2,580	1.1 %	45.0 %	Avenue Sup	4,828	(5.0) %	65.8 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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