



25 Jan.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,149	(2.7) %	15.3 %
BSE SENSEX	57,492	(2.6) %	14.9 %
CNX BANK	36,948	(1.7) %	9.1 %
CNX MIDCAP	29,383	(3.9) %	21.8 %
CNX SMALLCAP	10,871	(4.8) %	31.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,365	0.3 %	(5.4) %
S&P 500	4,410	0.3 %	(7.5) %
FTSE 100	7,297	(2.6) %	(2.8) %
HANG SENG	24,656	(1.2) %	5.9 %
NIKKEI	27,588	0.2 %	(5.8) %
SHANGHAI COMPOSITE	3,524	0.0 %	(3.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.31	0.0 %	(0.1) %
EUR/USD	1.13	(0.0) %	(0.3) %
GBP/USD	1.36	(0.4) %	0.3 %
USD/JPY	113.78	(0.4) %	(1.2) %
USD/AUD	1.39	0.7 %	1.1 %
USD/SGD	1.35	(0.1) %	(0.3) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	87	1.7 %	12.9 %
Gold(INR/10g)	48,650	0.4 %	1.0 %
Gold Comex(USD/oz)	1,838	(0.3) %	1.3 %
SILVER(INR/1Kg)	64,467	(0.3) %	3.8 %
Aluminium(USD/MT)	2,806	(8.9) %	(0.3) %
Copper(USD/MT)	9,692	(2.8) %	0.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	1.8	(0.0) %	0.2 %

Global Economy: the flash US manufacturing Purchasing Managers Index for January dropped to 55.0, marking a 15-month low, research firm IHS Markit said in its latest report. The service sector's PMI reading fell to 50.9 in January, the lowest level in 18 months. Labor shortages, employee absences and the Omicron wave reportedly weighed on growth, the report said. Eurozone flash composite output index slid to an 11-month low of 52.4 in January, from 53.3 in December, flash survey results from IHS Markit showed on Monday. Nonetheless, a reading above 50.0 indicates expansion in the sector. The slowdown masked wide variations in the performance by sector. The service sector grew at the slowest pace since last April, while the manufacturing growth accelerated to the fastest since last August. The services Purchasing Managers' Index came in at 51.2, down from 53.1 in the prior month. Meanwhile, the manufacturing PMI rose unexpectedly to 59.0 from 58.0 a month ago. An alleviation of supply chain delays provided a welcome boost to manufacturing production. Germany's private sector rebounded to 54.3 in January from 49.9 in December, led by a stronger performance from the manufacturing sector, flash survey results from IHS Markit showed on Monday. The IHS Markit/CIPS UK Composite PMI edged down to 53.4 in January 2022 from 53.6 in the previous month. Manufacturing PMI fell to 56.9 in January of 2022 from 57.9 in December, pointing to the slowest growth in factory activity since February. Japan manufacturing sector continued to expand in January with a manufacturing PMI score of 54.6, the latest survey from Jibun Bank revealed on Monday. That's up from 54.3 in December. Australia manufacturing sector continued to expand in January with a manufacturing PMI score of 55.3, the latest survey from Markit Economics revealed on Monday. That's down from 57.7 in December.

Global Equities: Global equities started the new week on a jittery note though a solid reversal saw the US stocks end in green.

Indian Economy: Ahead of Union Budget 2022-23, Confederation of Indian Industry (CII) has urged state governments to lift restrictions on economic activity, given that the occupancy rate of hospital beds due to the Omicron variant of Covid is well within the manageable level. The Budget, coming during the third wave of the pandemic, is expected to focus on measures for strengthening economic recovery. The Reserve Bank of India will conduct a Variable Rate Reverse Repo auction on January 25, 2022, Tuesday for a notified amount of Rs 200000 crore and tenor of 3 days. The central bank will also conduct a Variable Rate Reverse Repo auction for Rs 50000 crore with a tenor of 28 days on the same day.

Equity Markets: The benchmark indices logged substantial losses on Monday as a result of weak global cues ahead of the Federal Open Market Committee meet. Sectoral indices declined across the board. The Nifty closed tad below 17,150 mark.

Corporate News: Tata Consultancy Services (TCS) has been recognized as a Leader in the ISG Provider Lens AWS Ecosystem Partners report for the US across Managed Services, SAP Workloads, Internet of Things, Migration Services and Consulting Services. Shriram Transport said its Net Interest Income for the Q3FY22 was at Rs. 2,387.97 crores as against Rs. 2,148.22 crores in the same period of the previous year. The profit after tax was Rs. 680.62 crores as against Rs. 727.72 crores recorded in the same period of the previous year. Bharti Airtel has informed that the meeting of the board of directors of the company is scheduled on 28 January 2022, to consider and approve the proposal for issuance of equity shares through preferential issue (other than to promoter / promoter group).



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(412.6)	(112.1)	(26.8)
MF(INR cr)	1,390.3	394.9	548.4

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	80,405	48,741	66,290
F&O(INR cr)	8,642,449	8,879,019	6,191,311

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.9	0	18.6
NSE VIX	22.8	17.7	16.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	36,948	(1.7) %	9.1 %	Energy	24,425	(2.5) %	31.9 %
IT	34,822	(3.4) %	34.0 %	Pharma	12,999	(1.8) %	5.0 %
Metals	5,420	(5.2) %	29.4 %	Finance	17,633	(2.3) %	10.8 %
Auto	11,261	(2.6) %	12.4 %	PSU	2,655	(2.0) %	19.9 %
FMCG	35,941	(2.4) %	3.1 %	Real Estate	462	(5.9) %	37.6 %

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>
Bandhan Ba	308	4.2 %	(12.3) %	Gland Phar	3,304	(7.4) %	33.9 %
Cipla	892	2.8 %	9.0 %	Aurobindo	610	(7.0) %	(30.8) %
Lupin	922	2.1 %	(10.2) %	Jindal Ste	377	(7.0) %	1.6 %
O N G C	166	1.3 %	58.8 %	Indraprast	396	(6.7) %	(24.7) %
Muthoot Fi	1,442	0.6 %	18.7 %	JSW Steel	622	(6.7) %	22.2 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
CPI q/q	25-01-2022	06:00	AUD	-	0.008
German ifo Business Climate	25-01-2022	14:30	EUR	-	94.7
Belgian NBB Business Climate	25-01-2022	19:30	EUR	-	3.6
Public Sector Net Borrowing	25-01-2022	12:30	GBP	-	-
CBI Industrial Order Expectations	25-01-2022	16:30	GBP	-	24
BOJ Core CPI y/y	25-01-2022	10:30	JPY	-	0.008
CB Consumer Confidence	25-01-2022	20:30	USD	-	115.8

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