



25 Jan.2023

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	18,118	0.0 %	2.5 %
BSE SENSEX	60,979	0.1 %	2.7 %
CNX BANK	42,733	0.0 %	15.0 %
CNX MIDCAP	31,152	0.0 %	3.4 %
CNX SMALLCAP	9,531	0.0 %	(10.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,734	0.3 %	1.8 %
S&P 500	4,017	(0.1) %	5.0 %
FTSE 100	7,757	(0.4) %	2.7 %
HANG SENG	22,045	1.8 %	9.4 %
NIKKEI	27,299	1.5 %	6.2 %
SHANGHAI COMPOSITE	3,265	0.8 %	4.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	81.31	(0.0) %	(1.7) %
EUR/USD	1.09	0.6 %	1.7 %
GBP/USD	1.24	0.3 %	2.5 %
USD/JPY	130.14	1.4 %	(0.8) %
USD/AUD	1.43	(1.4) %	(2.6) %
USD/SGD	1.32	(0.4) %	(1.8) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	82	(0.0) %	6.1 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,953	2.2 %	6.1 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,593	0.3 %	10.9 %
Copper(USD/MT)	934	(89.9) %	(88.9) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.5	0.0 %	(0.4) %

**Global Economy:** Eurozone private sector returned to growth at the start of the year after six consecutive months of contraction, raising hopes that the region might escape recession, flash survey results from S&P Global showed. The flash composite output index rose more-than-expected to 50.2 in January from 49.3 in December. The survey showed that the services Purchasing Managers' Index advanced to a six-month high of 50.7 from 49.8 in the previous month. At 48.8, the manufacturing PMI hit a five-month high and up from 47.8 in December. Germany's private sector downturn softened to a stable footing at the start of the year amid a moderation in price pressures along with a renewed positive outlook on reducing recession risks and ongoing strength in the job market, flash survey data from S&P Global showed on Tuesday. The flash composite output index rose to a seven-month high of 49.7 in January from 49.0 in December. However, any reading below 50 indicates contraction in the sector. The services Purchasing Managers' Index, or PMI, climbed to a 7-month high of 50.4 in January from 49.2 in the prior month. The manufacturing PMI dropped to a two-month low of 47.0 from 47.1 in December. Consumer prices in Australia were up 7.8 percent on year in the fourth quarter of 2022, the Australian Bureau of Statistics reported - accelerating from 7.3 percent in the three months prior. On a seasonally adjusted quarterly basis, inflation climbed 1.9 percent.

**Global Indices:** The tech-heavy Nasdaq fell 30.14 points or 0.3 percent to 11,334.27 after leading the two-day rally. The S&P 500 also edged down 2.86 points or 0.1 percent to 4,016.95, while the Dow rose 104.40 points or 0.3 percent to 33,733.96.

**Indian Economy:** Electronic Toll Collection (ETC) through FASTag has witnessed constant growth over last few years. Total toll collection via FASTag on fee plazas, including State Highway fee plazas during calendar year 2022 was Rs. 50,855 crore, which is an increase of approx. 46% as compared to Rs. 34,778 crore in 2021. The average daily toll collection through FASTag on NH fee plazas in December 2022 was Rs 134.44 Crore, and the single day highest collection touched Rs. 144.19 Crore on 24 December 2022. Similarly, the number of FASTag transactions also witnessed a growth of approx. 48% in 2022 as compared to that in 2021.

**Equity Market:** The barometer index, the S&P BSE Sensex added 37.08 points or 0.06% to 60,978.75. The Nifty 50 index ended flat at 18,118.30.

**Corporate News:** Pidilite Industries reported consolidated net profit of Rs 307.74 crore in Q3 FY23 from Rs 359.24 crore in Q3 FY22. Total income rose to Rs 3002.72 crore in Q3 FY23 from Rs 2855.89 crore in Q3 FY22. Indus Towers reported consolidated net loss of Rs 708 crore in Q3 FY23 as compared to net profit of Rs 1571 crore in Q3 FY22. Revenue fell to Rs 6765 crore in Q3 FY23 from Rs 6927 crore in Q3 FY22.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	27.6	(99.7)	(25.5)
MF(INR cr)	529.0	204.7	625.9

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	2,947	37,053	50,389
F&O(INR cr)	19,974,299	20,143,632	13,916,837

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.8	20.5	25.3
NSE VIX	13.7	14.6	18.2

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	42,733	(0.2) %	15.0 %	Energy	25,962	(0.7) %	(1.9) %
IT	30,317	0.8 %	(16.6) %	Pharma	12,594	(1.0) %	(7.3) %
Metals	6,718	(0.9) %	3.7 %	Finance	18,890	0.0 %	8.1 %
Auto	12,961	1.3 %	21.4 %	PSU	4,190	(1.4) %	47.8 %
FMCG	44,324	0.1 %	20.7 %	Real Estate	420	(1.0) %	(11.4) %

## 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>
FSN E-Comm	134	7.7 %	(52.4) %	P I Indust	3,036	(3.0) %	6.2 %
Tata Motor	422	3.4 %	(4.3) %	SBI Cards	745	(2.9) %	(14.5) %
Maruti Suz	8,699	3.3 %	13.0 %	Axis Bank	910	(2.4) %	17.5 %
LTI Mindtr	4,509	3.2 %	(27.0) %	Colgate-Pa	1,459	(2.1) %	(5.8) %
Mphasis	2,117	2.8 %	(36.7) %	Dr Reddy's	4,253	(2.0) %	(0.6) %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
MI Leading Index m/m	25-01-2023	05:00	AUD	-	(0.001)
CPI q/q	25-01-2023	06:00	AUD	-	0.018
BOC Monetary Policy Report	25-01-2023	20:30	CAD	-	-
BOC Press Conference	25-01-2023	21:30	CAD	-	-
Credit Suisse Economic Expectations	25-01-2023	14:30	CHF	-	(42.8)
Belgian NBB Business Climate	25-01-2023	19:30	EUR	-	(13.6)
PPI Input m/m	25-01-2023	12:30	GBP	-	0.006
CPI q/q	25-01-2023	03:15	NZD	-	0.022
Credit Card Spending y/y	25-01-2023	07:30	NZD	-	0.16
Crude Oil Inventories	25-01-2023	21:00	USD	-	-

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