



25 Oct.2021

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	18,115	(0.3) %	21.8 %
BSE SENSEX	60,822	(0.2) %	21.6 %
CNX BANK	40,324	0.7 %	19.1 %
CNX MIDCAP	31,082	(0.9) %	28.9 %
CNX SMALLCAP	10,973	(1.2) %	32.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,677	0.2 %	16.6 %
S&P 500	4,545	(0.1) %	21.0 %
FTSE 100	7,205	0.2 %	9.6 %
HANG SENG	26,127	0.4 %	(4.9) %
NIKKEI	28,805	0.3 %	5.7 %
SHANGHAI COMPOSITE	3,583	(0.3) %	2.3 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.75	(0.1) %	2.5 %
EUR/USD	1.16	(0.0) %	(5.1) %
GBP/USD	1.38	0.0 %	1.1 %
USD/JPY	114.03	(0.3) %	10.5 %
USD/AUD	1.33	0.1 %	2.9 %
USD/SGD	1.35	0.1 %	1.8 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	84	1.5 %	75.9 %
Gold(INR/10g)	47,604	0.5 %	(6.7) %
Gold Comex(USD/oz)	1,794	0.3 %	(8.0) %
SILVER(INR/1Kg)	65,034	0.6 %	(5.6) %
Aluminium(USD/MT)	2,946	(2.3) %	46.3 %
Copper(USD/MT)	9,992	(0.6) %	26.2 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	(0.1) %	0.7 %

**Global Economy:** The US Federal Reserve Chairman Jerome Powell said that the central bank would watch carefully for signs that households and businesses were expecting sustained price pressures to continue. Powell said Friday at a virtual conference that US central bank should start the process of reducing its support of the economy by cutting back on its asset purchases, but should not yet touch the ultra low interest rate regime. Eurozone private sector growth eased sharply to a six-month low in October amid rising supply bottlenecks and COVID-19 concerns, flash survey results from IHS Markit showed on Friday. The composite output index dropped to 54.3 in October from 56.2 in September. UK retail sales volume including auto fuel decreased 0.2% month-on-month in September, after easing by revised 0.6% in August, data published by the Office for National Statistics showed on Friday. Japan manufacturing sector continued to expand in October with a manufacturing PMI score of 53.0, the latest survey from Jibun Bank showed on Friday. That's up from 51.5 in September, and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. Both output and new order volumes reversed the declines recorded in September to rise at a marginal pace. Moreover, job creation continued for the seventh successive month, with the rate of growth the quickest since April 2019. The survey also showed that the services PMI climbed to 50.7 in October from 47.4 in September, while the composite also rose to 50.7 from 47.9 a month earlier. Australia manufacturing sector continued to expand in October, and at a faster pace, the latest survey from Markit Economics showed on Friday with a manufacturing PMI score of 57.3. That's up from 56.8 in September, and it moves further above the boom-or-bust line of 50 that separates expansion from contraction.

**Global Equities:** The DOW hit a record high on Friday as sustained buying supported the sentiments.

**Indian Economy:** Domestic Crude oil production during September 2021 was 2443.3TMT, which is 5.49% lower than target for the month and 1.74% lower than the production of September 2020. Cumulative crude oil production during April-September, 2021 was 14924.5 TMT, which is 3.68% and 2.92% lower than target for the period and production during corresponding period of last year respectively. Natural gas production during September 2021 was 2902.4 MMSCM, which is 26.6% higher than the production of September 2020 but 8.48% lower than the monthly target. Cumulative natural gas production during April-September 2021 was 16890.9 MMSCM, which is 26.6% higher than production during corresponding period of last year but 6.7% lower when compared with target for the period.

**Equity Markets:** The domestic equity benchmarks ended with minor cuts after a volatile session on Friday. The Nifty closed below the 18,150 mark. Metals, IT, pharma, healthcare, auto and FMCG declined while banks, financials and realty stocks outperformed.

**Corporate News:** Reliance Industries reported a 43% year-on-year rise in consolidated net profit to Rs 13,680 crore for the quarter ended September. The oil-to-telecom company reported a 48 per cent growth in its consolidated revenue from operations to Rs 1.74 lakh crore for the reported quarter. The company posted a record quarterly consolidated operating profit of Rs 30,283 crore, which was 30% higher than the year-ago period. Apollo Tyres has introduced its European tyre brand Vredestein in the country to cater to premium cars and superbike segments.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(323.1)	(3.2)	8.7
MF(INR cr)	(421.3)	219.3	413.1

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	84,810	90,412	72,867
F&O(INR cr)	5,024,180	6,710,971	5,432,215

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.4	18.6	18.1
NSE VIX	17.6	16.8	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	40,324	0.7 %	19.1 %	Energy	24,281	(0.1) %	31.1 %
IT	35,395	(1.4) %	36.2 %	Pharma	13,950	(1.6) %	12.7 %
Metals	5,690	(3.0) %	35.8 %	Finance	19,303	0.6 %	21.3 %
Auto	11,434	(1.1) %	14.1 %	PSU	2,823	(0.5) %	27.5 %
FMCG	38,875	(1.2) %	11.5 %	Real Estate	511	2.6 %	52.1 %

### 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>
SBI Cards	1,130	3.7 %	15.9 %	Vedanta	324	(7.6) %	40.0 %
Muthoot Fi	1,566	2.3 %	29.0 %	Info Edg.(	6,290	(6.5) %	47.5 %
Bandhan Ba	323	2.1 %	(7.9) %	Biocon	324	(6.1) %	(21.1) %
H D F C	2,904	2.1 %	14.7 %	Hindalco I	470	(4.7) %	34.3 %
Indus Towe	302	2.1 %	18.2 %	Jubilant F	3,701	(4.3) %	25.4 %

### 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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