



25 Nov.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,415	(0.5) %	17.1 %
BSE SENSEX	58,341	(0.6) %	16.6 %
CNX BANK	37,442	0.5 %	10.6 %
CNX MIDCAP	30,743	(0.4) %	27.5 %
CNX SMALLCAP	11,007	0.6 %	32.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,804	(0.0) %	17.0 %
S&P 500	4,701	0.2 %	25.2 %
FTSE 100	7,286	0.3 %	10.9 %
HANG SENG	24,686	0.1 %	(10.1) %
NIKKEI	29,303	(1.6) %	7.5 %
SHANGHAI COMPOSITE	3,593	0.1 %	2.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.31	0.2 %	1.9 %
EUR/USD	1.13	(0.2) %	(8.2) %
GBP/USD	1.34	(0.2) %	(1.7) %
USD/JPY	114.43	0.3 %	10.9 %
USD/AUD	1.38	(0.3) %	6.4 %
USD/SGD	1.36	0.1 %	3.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	79	2.3 %	64.8 %
Gold(INR/10g)	47,447	(0.5) %	(7.0) %
Gold Comex(USD/oz)	1,797	(0.9) %	(7.8) %
SILVER(INR/1Kg)	62,881	(1.4) %	(8.7) %
Aluminium(USD/MT)	2,691	1.4 %	33.6 %
Copper(USD/MT)	9,826	1.0 %	24.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	0.0 %	0.7 %

Global Economy: The US Commerce Department said real gross domestic product advanced by 2.1% in the third quarter compared to the previously reported 2% increase. Despite the slightly stronger than previously estimated increase, the GDP growth in the third quarter still reflects a substantial slowdown from the 6.7% spike in the second quarter. The University of Michigan released a report on Wednesday showing consumer sentiment in the US decreased by slightly less than initially estimated in the month of November. The report said the consumer sentiment index for November was upwardly revised to 67.4 from the preliminary reading of 66.8. After reporting a sharp increase in US new home sales in the previous month, the Commerce Department released a report on Wednesday showing new home sales saw continued growth in the month of October. The report said new home sales rose by 0.4% to an annual rate of 745,000 in October after spiking 7.1% to a downwardly revised rate of 742,000 in September. The US initial jobless claims tumbled to five decades low of 199,000, a decrease of 71,000 from the previous week's revised level of 270,000. The US durable goods orders fell by 0.5% in October following a 0.4% drop in September. The German ifo Institute business confidence index fell to 96.5 in November from 97.7 in October. The expectations index came in at 94.2 in November from October's initially estimated 95.4. The manufacturing sector in Japan saw improved activity in November, the latest survey from Jibun Bank revealed on Wednesday with a manufacturing PMI score of 54.2. This was up from 53.2 in October and it moved further above the boom-or-bust line of 50 that separates expansion from contraction. Both output and new order growth quickened in November.

Global Equities: The US stocks edged lower despite strong economic cues as rising US Covid-19 cases weighed.

Indian Economy: Securities and Exchange Board of India (Sebi) postponed the implementation of the 50% cash-margin rule for futures and options (F&O) traders and credit-default swaps (CDS) segment to 28 February 2022, from the earlier deadline of 1 December 2021. The regulator cited investor interest, and market regulation and development as reasons for the deferment, in its recently issued circular.

Equity Markets: The domestic equities reversed intraday gains and settled with sharp losses on Wednesday. The Nifty ended near 17,400 mark after hitting the day's high of 17,600.60 in afternoon trade. Auto and IT stocks tumbled while private banks and oil & gas stocks bucked the trend.

Corporate News: Reliance Industries' (RIL) board on November 24 announced that it has decided to implement a scheme of arrangement (Scheme) to transfer Gasification Undertaking into a wholly-owned subsidiary (WOS). Siemens has recommended a dividend of Rs 8 per equity share for the financial year ended September 2021. Pidilite Industries subsidiary Madhumala Ventures has agreed to make an investment of Rs 1.56 crore in Constrobot Robotics which is engaged in the business of research, development, manufacturing and trading of robotic equipment and related software to be used in construction activities.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(625.4)	144.9	6.3
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)	69,833	64,468	72,276
F&O(INR cr)	7,906,935	7,111,122	5,678,642

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.4	17.3	17.9
NSE VIX	17.1	16.2	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	37,442	0.5 %	10.6 %	Energy	23,650	0.3 %	27.7 %
IT	34,966	(1.5) %	34.6 %	Pharma	13,408	(0.6) %	8.3 %
Metals	5,603	0.0 %	33.7 %	Finance	18,304	0.2 %	15.1 %
Auto	11,309	(1.3) %	12.8 %	PSU	2,759	0.3 %	24.6 %
FMCG	38,178	(1.0) %	9.5 %	Real Estate	516	(0.1) %	53.6 %

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>
Adani Port	763	4.6 %	3.6 %	Pidilite I	2,263	(3.4) %	24.1 %
O N G C	153	4.6 %	47.1 %	Tata Consu	799	(2.7) %	22.9 %
Adani Ente	1,755	2.8 %	58.5 %	L & T Info	6,749	(2.6) %	64.1 %
ICICI Lomb	1,488	2.0 %	3.5 %	Cholaman.I	591	(2.6) %	5.0 %
Coal India	159	1.9 %	20.4 %	Vedanta	346	(2.5) %	49.4 %

EVENTS CALENDAR

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

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