



26 Sep.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,327	(1.7) %	(1.9) %
BSE SENSEX	58,099	(1.7) %	(2.0) %
CNX BANK	39,546	(2.7) %	6.5 %
CNX MIDCAP	31,079	(2.3) %	3.1 %
CNX SMALLCAP	9,589	(2.0) %	(9.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,590	(1.6) %	(18.6) %
S&P 500	3,693	(1.7) %	(22.5) %
FTSE 100	7,019	(2.0) %	(6.5) %
HANG SENG	17,933	(1.2) %	(22.9) %
NIKKEI	27,154	(0.6) %	(7.3) %
SHANGHAI COMPOSITE	3,088	(0.7) %	(15.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	79.62	0.0 %	7.1 %
EUR/USD	0.98	(0.6) %	(13.4) %
GBP/USD	1.13	(0.6) %	(16.7) %
USD/JPY	143.11	(0.6) %	24.3 %
USD/AUD	1.51	0.6 %	9.7 %
USD/SGD	1.42	0.3 %	5.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	79	(5.7) %	2.3 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,651	(1.7) %	(9.0) %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,153	(1.9) %	(23.5) %
Copper(USD/MT)	7,446	(4.7) %	(22.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.1	0.0 %	0.1 %
10 Y GSec US 10	3.8	0.1 %	2.2 %

Global Economy: The UK private sector shrank at the fastest pace since early 2021 on the negative impacts of high costs and a weaker economic outlook, flash survey results from S&P Global and the Chartered Institute of Procurement & Supply revealed. The composite output index came in at a 20-month low of 48.4 in September versus 49.6 in the previous month. The services Purchasing Managers' Index slipped to 49.2 from 50.9 a month ago, while the reading was forecast to hit a neutral 50.0 level. Services activity shrank for the first time since February 2021. Meanwhile, the manufacturing PMI rose to 48.5 from 47.3 in the prior month. The expected level was 47.5. UK retail sales declined sharply in September on the cost of living crisis, the Distributive Trades Survey from the Confederation of British Industry showed. The retail sales balance fell more-than-expected to -20 percent in September from +37 percent in August. The score was seen at +10 percent. The Eurozone economic downturn deepened in September with worsening performances in both manufacturing and services with demand easing sharply as a result of the cost of living crisis, flash survey results from S&P Global showed. The flash composite output index declined to a 20-month low of 48.2 in September from 48.9 in the previous month. Singapore's consumer price inflation climbed 7.5 percent year-on-year in August, following a 7.0 percent rise in July. MAS core inflation rose to 5.1 percent in August from 4.8 percent in the previous month.

Global Indices: The Dow tumbled 486.27 points or 1.6 percent to 29,590.41, the Nasdaq dove 198.88 points or 1.8 percent to 10,867.93 and the S&P 500 plunged 64.76 points or percent to 1.7 percent to 3,693.23.

Indian Economy: The year 2021-22 recorded the highest ever FDI at \$83.6 billion. This FDI has come from 101 countries, and invested across 31 UTs and States and 57 sectors in the country. On the back of economic reforms and Ease of Doing Business in recent years, India is on track to attract US\$ 100 Bn FDI in the current FY. The Ministry of Commerce & Industry reported on account of 8 years of Make in India program. Production Linked Incentive (PLI) scheme across 14 key manufacturing sectors, was launched in 2020-21 as a big boost to Make in India initiative.

Equity Market: The barometer index, the S&P BSE Sensex, dropped 1020.80 points or 1.73% to 58,098.92. The Nifty 50 index tumbled 302.45 points or 1.72% to 17,327.35. Both the indices have corrected over 2.7% in three consecutive sessions.

Corporate News: Blue Star incorporated Blue Star North America Inc., a wholly owned subsidiary of the company in the State of Delaware, USA on 22 September 2022. The board of Jindal Stainless approved issuing upto 990 rated, listed, unsecured, redeemable, NCDs having face value of Rs 10 lakh each, aggregating to Rs 99 crore, through private placement basis. SBI announced the allotment of non-convertible, unsecured Basel III compliant Tier 2 bonds Series I of Rs 4,000 crore on private placement basis.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(275.9)	34.8	(59.0)
MF(INR cr)	482.1	462.2	735.8

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	60,573	68,063	56,023
F&O(INR cr)	9,040,089	14,969,329	11,806,157

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	29.9	26.1	25.7
NSE VIX	20.6	19.0	19.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	39,546	(2.7) %	6.5 %	Energy	26,500	(2.7) %	0.2 %
IT	26,592	(0.7) %	(26.8) %	Pharma	12,611	(0.0) %	(7.1) %
Metals	6,027	(1.2) %	(6.9) %	Finance	17,947	(2.5) %	2.7 %
Auto	13,094	(1.7) %	22.6 %	PSU	3,054	(4.0) %	7.7 %
FMCG	44,855	(0.5) %	22.2 %	Real Estate	437	(3.0) %	(8.0) %

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>
Divi's Lab	3,643	1.7 %	(16.8) %	Power Grid	203	(8.0) %	(10.0) %
Sun Pharma	921	1.4 %	1.4 %	Cholaman.I	739	(5.8) %	4.3 %
One 97	693	1.1 %	21.2 %	Punjab Nat	38	(5.8) %	5.0 %
Ambuja Cem	539	1.0 %	76.9 %	Bank of Ba	133	(4.3) %	14.2 %
Tata Steel	104	0.7 %	(20.8) %	Apollo Hos	4,418	(4.1) %	(2.0) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
German Buba President Nagel Speaks	26-09-2022	12:30	EUR	-	-
German ifo Business Climate	26-09-2022	13:30	EUR	-	88.5
ECB President Lagarde Speaks	26-09-2022	18:30	EUR	-	-
Rightmove HPI m/m	26-09-2022	04:31	GBP	-	(0.013)
MPC Member Tenreiro Speaks	26-09-2022	21:30	GBP	-	-
Flash Manufacturing PMI	26-09-2022	06:00	JPY	-	51.5
FOMC Member Collins Speaks	26-09-2022	19:30	USD	-	-

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