



26 Nov.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,536	0.7 %	18.0 %
BSE SENSEX	58,795	0.8 %	17.5 %
CNX BANK	37,365	(0.2) %	10.4 %
CNX MIDCAP	30,927	0.6 %	28.2 %
CNX SMALLCAP	11,092	0.8 %	33.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,804	(0.0) %	17.0 %
S&P 500	4,701	0.2 %	25.2 %
FTSE 100	7,310	0.3 %	11.2 %
HANG SENG	24,740	0.2 %	(9.9) %
NIKKEI	29,499	0.7 %	8.2 %
SHANGHAI COMPOSITE	3,584	(0.2) %	2.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.39	0.1 %	2.0 %
EUR/USD	1.12	(0.1) %	(8.3) %
GBP/USD	1.34	(0.3) %	(2.0) %
USD/JPY	114.98	0.5 %	11.4 %
USD/AUD	1.38	0.3 %	6.7 %
USD/SGD	1.37	0.2 %	3.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	78	(0.1) %	64.6 %
Gold(INR/10g)	47,522	0.2 %	(6.8) %
Gold Comex(USD/oz)	1,796	(0.0) %	(7.9) %
SILVER(INR/1Kg)	63,090	0.3 %	(8.4) %
Aluminium(USD/MT)	2,699	0.3 %	34.0 %
Copper(USD/MT)	9,852	0.3 %	24.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	(0.0) %	0.7 %

Global Economy: The minutes of the latest European Central Bank meeting stated that while the Governing Council would benefit from new staff macroeconomic projections at its December meeting, it was cautioned that the data available in December would not resolve all the uncertainties around the medium-term inflation outlook. While policymakers expressed confidence that the effects of higher energy prices and of supply bottlenecks would be temporary, the decline in inflation in 2022 would now take longer than previously expected, the minutes noted. The German economy expanded slightly less than estimated in the third quarter, revised data from Destatis showed on Thursday. Gross domestic product grew 1.7% sequentially in the third quarter, instead of 1.8% estimated on October 29. Destatis said the recovery of the German economy thus continued in summer, after the GDP had grown by 2% in the second quarter. On a yearly basis, calendar-adjusted GDP growth eased markedly to 2.5%, in line with preliminary estimate, from 10% in the second quarter. Japan's leading index decreased less than initially estimated in September, final data from the Cabinet Office showed. The leading index, which measures the future economic activity, fell to 100.9 in September from 101.3 in August. In the initial estimate, the reading was 99.7. Private capital expenditure in Australia slipped by a seasonally adjusted 2.2% on quarter in the third quarter of 2021, the Australian Bureau of Statistics said on Thursday - coming in at A\$32.699 billion. This followed the 4.4% rise in the previous three months. On a yearly basis, overall capital spending rose nearly 13% while building capex rose 9%.

Global Equities: The US stocks were shut for Thanksgiving Day holiday while modest gains were seen in European markets.

Indian Economy: Payroll data by the Ministry of Statistics and Programme Implementation, released on Thursday, shows 1.33 million new subscribers were added under the Employees State Insurance Corporation compared to 1.34 million in August while the addition under the National Pension Scheme stood at 72,923 as against 56,827 in August 2021. Addition under NPS is second highest in the current fiscal so far after June when it stood at 78,265.

Equity Markets: Local markets moved up from a three month low on steady global cues. Benchmark indices ended on positive note with Nifty finishing the F&O series above 17,500 mark. Among sectors, oil & gas, realty, pharma indices added 1% each.

Corporate News: Aurobindo Pharma will be in focus as Life Insurance Corporation of India bought 79,000 equity shares in the company via an open market transaction on November 24, increasing shareholding to 5.01 percent from 4.99 percent earlier. The Board of Directors of JSW Energy has approved the re-organisation of the Company's Green (Renewable) and Grey (Thermal) Businesses. As a result of this re-organisation, all the existing and upcoming renewable energy businesses will be housed under 'JSW Energy Neo', a wholly owned subsidiary of the Company. Engineers India and Chempolis OY, Finland have signed a strategic alliance for the conversion of biomass to green fuels.

Ugro Capital approved the issuance of 150 rated, senior, secured, listed, transferable, redeemable, principal protected market linked non-convertible debentures of face value of Rs 10 lakh each aggregating Rs 15 crore on private placement basis. The deemed date of allotment is 30 November 2021.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(1,082.4)	63.1	(0.8)
MF(INR cr)	1,507.9	743.6	438.8

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	67,161	64,627	72,244
F&O(INR cr)	13,504,962	7,487,230	5,727,252

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.6	17.3	17.9
NSE VIX	16.7	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	37,365	(0.2) %	10.4 %	Energy	24,218	2.4 %	30.8 %
IT	35,300	1.0 %	35.9 %	Pharma	13,567	1.2 %	9.6 %
Metals	5,624	0.4 %	34.3 %	Finance	18,264	(0.2) %	14.8 %
Auto	11,248	(0.5) %	12.2 %	PSU	2,744	(0.5) %	23.9 %
FMCG	38,260	0.2 %	9.7 %	Real Estate	526	1.9 %	56.6 %

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>
Vedanta	368	6.4 %	59.0 %	Siemens	2,155	(5.3) %	16.0 %
Torrent Ph	2,991	6.1 %	17.4 %	Interglobe	2,072	(3.3) %	28.1 %
Reliance I	2,493	6.0 %	23.3 %	H P C L	316	(2.5) %	33.0 %
Apollo Hos	5,701	5.6 %	97.0 %	I O C L	126	(1.5) %	34.9 %
Adani Tran	2,030	4.8 %	103.1 %	Britannia	3,573	(1.4) %	(1.2) %

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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