



27 Jan.2023

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,892	(1.2) %	1.3 %
BSE SENSEX	60,205	(1.3) %	1.6 %
CNX BANK	41,648	(2.5) %	12.1 %
CNX MIDCAP	30,694	(1.5) %	1.9 %
CNX SMALLCAP	9,421	(1.2) %	(11.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,949	0.6 %	2.5 %
S&P 500	4,060	1.1 %	6.2 %
FTSE 100	7,761	0.2 %	2.7 %
HANG SENG	22,567	2.4 %	12.0 %
NIKKEI	27,363	(0.1) %	6.4 %
SHANGHAI COMPOSITE	3,265	0.8 %	4.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	81.57	0.3 %	(1.3) %
EUR/USD	1.09	(0.0) %	1.7 %
GBP/USD	1.23	(0.4) %	2.1 %
USD/JPY	130.21	0.1 %	(0.7) %
USD/AUD	1.42	(0.5) %	(3.1) %
USD/SGD	1.32	0.1 %	(1.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	80	(1.8) %	4.2 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,953	0.0 %	6.2 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,595	0.1 %	11.0 %
Copper(USD/MT)	9,308	896.6 %	10.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.5	(0.1) %	(0.4) %

Global Economy: The Commerce Department released a report on Thursday showing U.S. economic activity surged by more than expected in the fourth quarter of 2022. The report said real gross domestic product shot up by 2.9 percent in the fourth quarter after spiking by 3.2 percent in the third quarter. The stronger than expected GDP growth reflected increases in private inventory investment, consumer spending, government spending, and non-residential fixed investment. Meanwhile, the positive contributions were partly offset by decreases in residential fixed investment and exports. New orders for U.S. manufactured durable goods soared by much more than expected in the month of December. The Commerce Department said durable goods orders spiked by 5.6 percent in December after tumbling by 1.7 percent in November. Producer prices in Japan were up 1.5 percent on year in December, the Bank of Japan reported - shy of expectations for an increase of 1.6 percent and slowing from 1.7 percent in November. On a monthly basis, producer prices rose 0.1 percent, easing from 0.2 percent in the previous month. Export prices in Australia were down 0.9 percent on quarter and 20.5 percent on year in the fourth quarter of 2022, the Australian Bureau of Statistics reported. Import prices rose 1.8 percent on quarter and 14.9 percent on year, fueled by gains from electrical machinery apparatus and appliances (+3.9 percent), telecommunications equipment (+4.3 percent) and general industrial machinery (+4.1 percent).

Global Indices: While the Nasdaq surged 199.06 points or 1.8 percent to 11,512.41, the S&P 500 shot up 44.21 points or 1.1 percent to 4,060.43 and the Dow climbed 205.57 points or 0.6 percent to 33,949.41.

Indian Economy: According to a report by International Copper Association India (ICA India), India's copper demand is back on the growth track in FY22, registering a year-over-year (YoY) growth of about 27.5%. The demand for red metal stood at 12.5 lakh tonnes in FY22, as compared to 9.78 lakh tonnes in FY21. The increase in copper demand also resulted in copper producers increasing their production. Indian integrated producers increased their copper wire rod production by 28.7% YoY as the demand increased in FY 22.

Equity Market: The barometer index, the S&P BSE Sensex tumbled 773.69 points or 1.27% to 60,205.06. The Nifty 50 index lost 226.35 points or 1.25% to 17,891.95.

Corporate News: Tata Motors reported a consolidated net profit of Rs 2,957.71 crore in Q3 FY23 as against a net loss of Rs 1,516.14 crore in Q3 FY22. The total revenue from operations increased by 22.5% YoY to Rs 88,488.59 crore during the quarter. EBITDA for the period under review was Rs 9,853 crore, up 33.2% YoY. Dr Reddy's Laboratories consolidated net profit jumped 76.52% to Rs 1,247.1 crore on 27.26% rise in revenues to Rs 6,770 crore in Q3 FY23 over Q3 FY22. Consolidated profit before tax stood at Rs 1,634.6 crore in the quarter, up 68.36% from Rs 970.9 crore posted in Q3 FY22.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(14.0)	(94.6)	(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)	52,654	37,920	50,400
F&O(INR cr)	40,120,346	21,253,449	14,045,918

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.2	20.5	25.3
NSE VIX	14.7	14.6	18.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	41,648	(2.5) %	12.1 %	Energy	25,450	(2.0) %	(3.8) %
IT	30,044	(0.9) %	(17.3) %	Pharma	12,440	(1.2) %	(8.4) %
Metals	6,704	(0.2) %	3.5 %	Finance	18,489	(2.1) %	5.8 %
Auto	12,957	(0.0) %	21.4 %	PSU	4,040	(3.6) %	42.5 %
FMCG	44,284	(0.1) %	20.6 %	Real Estate	413	(1.8) %	(13.0) %

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>
Maruti Suz	8,784	1.0 %	14.1 %	Adani Tran	2,518	(8.8) %	4.0 %
Hindalco I	489	0.9 %	(14.3) %	Zomato Ltd	48	(8.3) %	(43.4) %
Hind. Unil	2,622	0.8 %	26.2 %	Ambuja Cem	460	(7.8) %	50.9 %
Bajaj Auto	3,717	0.8 %	(0.6) %	Indus Towe	158	(7.4) %	(28.7) %
Tata Steel	121	0.5 %	(8.1) %	ACC	2,166	(7.3) %	0.7 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Import Prices q/q	27-01-2023	06:00	AUD	-	0.03
Spanish Flash GDP q/q	27-01-2023	13:30	EUR	-	0.001
M3 Money Supply y/y	27-01-2023	14:30	EUR	-	0.048
Tokyo Core CPI y/y	27-01-2023	05:00	JPY	-	0.04
ANZ Business Confidence	27-01-2023	05:30	NZD	-	(70.2)
Core PCE Price Index m/m	27-01-2023	19:00	USD	-	0.002
Pending Home Sales m/m	27-01-2023	20:30	USD	-	(0.04)

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