



27 Sep.2022

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,016	(1.8) %	(3.7) %
BSE SENSEX	57,145	(1.6) %	(3.6) %
CNX BANK	38,616	(2.4) %	4.0 %
CNX MIDCAP	30,112	(3.1) %	(0.1) %
CNX SMALLCAP	9,263	(3.4) %	(12.7) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	29,261	(1.1) %	(19.5) %
S&P 500	3,655	(1.0) %	(23.3) %
FTSE 100	7,021	0.0 %	(6.5) %
HANG SENG	17,855	(0.4) %	(23.3) %
NIKKEI	26,432	(2.7) %	(9.8) %
SHANGHAI COMPOSITE	3,051	(1.2) %	(16.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	81.24	2.0 %	9.3 %
EUR/USD	0.97	(2.2) %	(14.8) %
GBP/USD	1.08	(4.3) %	(19.8) %
USD/JPY	143.41	(0.4) %	24.6 %
USD/AUD	1.53	2.1 %	11.4 %
USD/SGD	1.43	1.2 %	6.1 %

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: Despite economic pressures, UK house price inflation accelerated in September driven by middle and high-end market sectors, data from property website Rightmove showed. Average asking prices increased 8.7 percent on a yearly basis in September, faster than the 8.2 percent rise in August. Month-on-month, house prices gained 0.7 percent, in contrast to the 1.3 percent fall in August. The rise in new seller asking prices was in line with the ten-year September average increase of 0.6 percent. German business confidence index fell sharply to 84.3 in September from 88.6 in August, signaling that the economy is slipping into a recession, survey results from the ifo Institute showed. Business confidence deteriorated across all four sectors of the economy. In manufacturing, the business climate index fell as companies were less satisfied with their current business and their expectations hit the lowest since April 2020. For the first time since February 2021, the business situation fell again into negative territory. China's central bank ramped up measures to safeguard the yuan from further depreciation on Monday as the U.S. Dollar continued to strengthen on the Federal Reserve's tightening stance. The People's Bank of China decided to raise the risk reserve requirement for banks' forward forex sales to 20 percent from zero. The PBoC had set the central parity rate of the renminbi at 7.0298 per dollar on Monday, the weakest since mid-2020. The currency is allowed to move within the range of 2 percent above or below the central parity each trading day in the spot market.

Global Indices: The Dow tumbled 329.60 points or 1.1 percent to 29,260.81, the Nasdaq slid 65.00 points or 0.6 percent to 10,802.92 and the S&P 500 slumped 38.19 points or 1.0 percent to 3,655.04.

Indian Economy: India's foreign exchange reserves fell for a seventh straight week, dropping to \$545.652 billion in the week to September 16, Reserve Bank of India's (RBI) weekly statistical supplement showed. The foreign exchange reserves stood at \$550.871 billion at the end of the previous week, down \$5.2 billion. In the week ending September 16, the foreign currency assets stood at \$484.901 billion, gold reserves at \$38.186 billion and special drawing rights at \$17.686 billion.

Equity Market: The barometer index, the S&P BSE Sensex, dropped 953.70 points or 1.64% to 57,145.22. The Nifty 50 index tumbled 311.05 points or 1.80% to 17,016.30. In four consecutive sessions, the Sensex has slipped 4.31% while the Nifty has tumbled 4.49%.

Corporate News: Mahindra Logistics entered into a Business Transfer Agreement with Rivigo Services Private Limited and its promoter for acquisition purchase of its B2B express business, as a going concern, on slump sale basis, for a lump sum consideration of Rs. 225 crore. Amara Raja Batteries announced a proposed transaction integrating its supply chain, leading to margin improvements by bringing the Plastics Component for Battery Business of Mangal Industries (MIL) into its own fold through a scheme of arrangement involving demerger of Plastics Component for Battery Business from MIL into ARBL ("Scheme").



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(321.3)	13.9	(61.2)
MF(INR cr)	(112.6)	398.2	701.6

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	70,020	68,172	56,139
F&O(INR cr)	11,016,667	14,749,737	11,799,578

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	29.9	26.1	25.7
NSE VIX	21.9	19.2	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	38,616	(2.4) %	4.0 %	Energy	25,684	(3.1) %	(2.9) %
IT	26,744	0.6 %	(26.4) %	Pharma	12,476	(1.1) %	(8.1) %
Metals	5,778	(4.1) %	(10.8) %	Finance	17,565	(2.1) %	0.6 %
Auto	12,594	(3.8) %	18.0 %	PSU	2,941	(3.7) %	3.8 %
FMCG	43,937	(2.0) %	19.7 %	Real Estate	418	(4.2) %	(11.9) %

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>
Asian Pain	3,438	1.3 %	10.4 %	Tata Motor	398	(6.1) %	(9.9) %
HCL Techno	907	1.2 %	(22.5) %	Bandhan Ba	262	(6.0) %	(18.3) %
Infosys	1,380	1.1 %	(27.5) %	Hindalco I	373	(5.8) %	(34.5) %
Lupin	654	0.9 %	(14.6) %	Punjab Nat	36	(5.6) %	(1.0) %
Divi's Lab	3,670	0.8 %	(16.2) %	Adani Port	863	(5.5) %	9.9 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
M3 Money Supply y/y	27-09-2022	13:30	EUR	-	0.055
MPC Member Pill Speaks	27-09-2022	19:05	GBP	-	-
SPPI y/y	27-09-2022	05:20	JPY	-	0.021
FOMC Member Mester Speaks	27-09-2022	01:30	USD	-	-
Fed Chair Powell Speaks	27-09-2022	17:00	USD	-	-
Core Durable Goods Orders m/m	27-09-2022	18:00	USD	-	0.002
HPI m/m	27-09-2022	18:30	USD	-	0.001
FOMC Member Bullard Speaks	27-09-2022	19:25	USD	-	-
CB Consumer Confidence	27-09-2022	19:30	USD	-	103.2

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