



27 Oct.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	18,268	0.0 %	22.9 %
BSE SENSEX	61,350	0.6 %	23.4 %
CNX BANK	41,238	0.0 %	21.8 %
CNX MIDCAP	31,102	0.0 %	29.0 %
CNX SMALLCAP	10,991	0.0 %	32.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,757	0.0 %	16.8 %
S&P 500	4,575	0.2 %	21.8 %
FTSE 100	7,278	0.8 %	10.7 %
HANG SENG	26,038	(0.4) %	(5.2) %
NIKKEI	29,106	1.8 %	6.8 %
SHANGHAI COMPOSITE	3,598	(0.3) %	2.7 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.97	0.3 %	2.8 %
EUR/USD	1.16	(0.1) %	(5.2) %
GBP/USD	1.38	(0.3) %	0.9 %
USD/JPY	113.69	(0.3) %	10.2 %
USD/AUD	1.34	0.1 %	3.0 %
USD/SGD	1.35	0.1 %	1.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	85	1.1 %	77.8 %
Gold(INR/10g)	47,975	0.1 %	(6.0) %
Gold Comex(USD/oz)	1,796	(0.8) %	(7.9) %
SILVER(INR/1Kg)	65,231	(0.3) %	(5.3) %
Aluminium(USD/MT)	2,831	(2.9) %	40.6 %
Copper(USD/MT)	9,988	(0.6) %	26.1 %

**FIXED INCOME**

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

**Global Economy:** US consumer confidence index jumped to 113.8 in October from an upwardly revised 109.8 in September, reflecting easing concerns about the Delta variant of the coronavirus, the Conference Board reported on Tuesday. The report showed the present situation index rose to 147.4 in October from 144.3 in September, as consumers saying business conditions are "good" edged down to 18.6% from 19.1% but consumers saying conditions are "bad" also slipped to 24.9% from 25.3%. US new home sales spiked in the month of September, according to a report released by the Commerce Department on Tuesday. The report said new home sales soared by 14% to an annual rate of 800,000 in September after falling by 1.4% to a downwardly revised rate of 702,000 in August. Despite the much stronger than expected monthly growth, new home sales in September were still down by 17.6% compared to the same month a year ago. Eurozone banks plan to tighten their conditions for housing loans further in the fourth quarter, the Bank Lending Survey from the European Central Bank showed on Tuesday. In the fourth quarter, Eurozone banks plan to tighten credit standards for loans to firms and to ease criteria slightly for consumer credit. Lending standards for consumer credit and other lending to households remained broadly unchanged in the third quarter. South Korea's gross domestic product rose a seasonally adjusted 0.3 percent on quarter in the third quarter of 2021, the Bank of Korea said in Tuesday's advance estimate. That was down from 0.8% in the previous three months. On an annualized basis, GDP grew 4.0 percent slowing from 6% in the three months prior. Real gross domestic income also was up 0.3% on quarter and it gained 2.4% on year.

**Global Equities:** The Dow and the S&P 500 once again reached new record closing highs on earnings data.

**Indian Economy:** The Government of India (GoI) has announced the Sale (Re-issue) of (i) GoI Floating Rate Bonds, 2028 for a notified amount of Rs 4,000 crore (nominal) through price based auction using uniform price method; (ii) 6.10% Government Security, 2031 for a notified amount of Rs 13,000 crore (nominal) through price based auction using uniform price method and (iii) 6.76% Government Security 2061 for a notified amount of Rs 7,000 crore (nominal) through price based auction using multiple price method.

**Equity Markets:** Equity indices ended at the day's high with strong gains on Tuesday. The Nifty index managed to close above the 18,250 level after hitting an intraday low of 18,099.30 in mid morning trade. Barring private sectoral banks, all sectoral indices on the NSE ended in the green. Domestic market sentiment was also boosted by positive global cues.

**Corporate News:** Axis Bank's net profit surged 86.21% to Rs 3133.32 crore on 2.99% increase in total income to Rs 20134.39 crore in Q2 September 2021 over Q2 September 2020. The bank's Net Interest Income (NII) grew 8% YoY to Rs 7,900 crore from Rs 7,326 crore in Q2FY21. Net interest margin (NIM) for Q2FY22 stood at 3.39%. Bajaj Finance reported 53% rise in consolidated net profit to Rs 1,481 crore on a 19% rise in total income to Rs 7,732 crore in Q2 FY22 as compared with Q2 FY21. Net interest income (NII) rose by 28% to Rs 5,335 crore in the second quarter from Rs 4,162 crore recorded in the same period last year. Cipla's consolidated net profit grew 7% year on year to Rs 711 crore on a 10% rise in total revenue from operations to Rs 5,520 crore in Q2 FY22 over Q2 FY21.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(253.1)	(44.5)	4.0
MF(INR cr)	(421.3)	219.3	413.1

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	78,654	89,475	73,004
F&O(INR cr)	6,211,648	6,665,135	5,444,827

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.2	18.2	18.0
NSE VIX	16.8	16.8	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	41,238	0.1 %	21.8 %	Energy	24,372	0.9 %	31.6 %
IT	35,162	0.4 %	35.3 %	Pharma	13,971	0.2 %	12.9 %
Metals	5,831	2.7 %	39.2 %	Finance	19,651	0.5 %	23.5 %
Auto	11,452	2.0 %	14.3 %	PSU	2,879	0.9 %	30.0 %
FMCG	38,827	0.9 %	11.3 %	Real Estate	514	3.6 %	53.2 %

### 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>
Tata Motor	509	6.0 %	65.3 %	Torrent Ph	2,944	(4.5) %	15.5 %
Jindal Ste	446	4.8 %	20.2 %	Gland Phar	3,560	(4.5) %	44.3 %
Cholaman.I	605	4.8 %	7.5 %	Indus Towe	281	(2.5) %	10.2 %
Tata Steel	1,344	3.9 %	55.7 %	IndusInd B	1,155	(1.9) %	16.3 %
S A I L	120	3.9 %	43.0 %	Adani Gree	1,180	(1.9) %	1.7 %

### EVENTS CALENDAR

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

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