



27 Dec.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,004	(0.4) %	14.4 %
BSE SENSEX	57,124	(0.3) %	14.2 %
CNX BANK	34,857	(0.9) %	3.0 %
CNX MIDCAP	29,613	(1.1) %	22.8 %
CNX SMALLCAP	10,849	(0.5) %	31.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,951	0.6 %	17.5 %
S&P 500	4,726	0.6 %	25.8 %
FTSE 100	7,372	(0.0) %	12.2 %
HANG SENG	23,224	0.1 %	(15.5) %
NIKKEI	28,783	(0.1) %	5.6 %
SHANGHAI COMPOSITE	3,618	(0.7) %	3.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	75.13	(0.4) %	3.0 %
EUR/USD	1.13	0.2 %	(7.6) %
GBP/USD	1.34	0.6 %	(1.9) %
USD/JPY	114.31	0.1 %	10.8 %
USD/AUD	1.38	(0.8) %	6.6 %
USD/SGD	1.36	(0.3) %	2.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	2.3 %	52.8 %
Gold(INR/10g)	48,088	(0.1) %	(5.7) %
Gold Comex(USD/oz)	1,810	0.2 %	(7.2) %
SILVER(INR/1Kg)	61,676	0.0 %	(10.4) %
Aluminium(USD/MT)	2,818	0.2 %	40.0 %
Copper(USD/MT)	9,606	(0.2) %	21.3 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	0.6 %

**Global Economy:** The new omicron variant of SARS-CoV-2 that causes COVID-19 is now present in over 100 countries, a significant increase from the 76 it was detected in till last week. Studies have established that the new variant of concern is far more transmissible than its predecessor, delta and has the ability to evade immunity, derived either from natural infection or vaccination. COVID-19 infections are set to rocket over the next two-three months and hit three billion, according to latest projections incorporating omicron data by the Institute for Health Metrics and Evaluation (IHME), an independent population health research centre at University of Washington Medicine. Japan overall nationwide consumer prices were up 0.6 percent on year in November, the Ministry of Internal Affairs and Communications said on Friday, up from 0.1 percent in October. Core CPI, which excludes volatile food prices, climbed an annual 0.5 percent, up from 0.1 percent in the previous month. Individually, prices were higher for food, housing, fuel, furniture, clothing and recreation; they were lower for medical care, transportation and communication. On a seasonally adjusted monthly basis, overall inflation and core CPI both rose 0.3 percent. Japan's housing starts increased 3.7 percent on a yearly basis in November, slower than the 10.4 percent expansion seen in October, data from the Ministry of Land, Infrastructure, Transport and Tourism showed on Friday. This was the weakest growth since March, when housing starts gained 1.5 percent. Annualized housing starts fell to seasonally adjusted 848,000 in November from 892,000 in the previous month. Singapore's manufacturing output expanded 14.6 per cent in November from a year ago, after a revised 17 per cent growth in October, according to data released by the Economic Development Board (EDB). Factory output rose for a second straight month with sustained growth in all production segments.

**Global Equities:** Sentiments are likely to be volatile for global markets after the Christmas holidays as Omicron concerns continue to weigh.

**Indian Economy:** Around 1.219 million new members joined the Employee State Insurance Corporation-run social security scheme in October this year compared with 1.357 million in the previous month. Gross new enrolments with Employees' State Insurance Corporation (ESIC) stood at 1.078 million in April, 891,000 in May, 1.068 million in June, 1.34 million in July and 1.347 million in August, data showed.

**Equity Markets:** Equity indices ended a volatile trading session with modest losses on Friday. Barring IT index, all sectoral indices on the NSE ended in red. The Nifty hit a day's low of 16,909.60 in morning trade after opening above the 17,100 mark. The index trimmed some losses and managed to close near the 17,000 mark.

**Corporate News:** Adani Transmission has received the Letter of Intent (LoI) for the acquisition of a renewable energy evacuation system under Khavda-Bhuj Transmission Ltd. With an estimated capex of more than Rs 1,200 crore, company's execution of the project will help evacuate about 3 GW of renewable energy from Khavda, Gujarat. Lupin Limited (Lupin) today announced that it has received approval from the United States Food and Drug Administration (FDA) for its Abbreviated New Drug Application (ANDA) Sevelamer Carbonate for Oral Suspension, 0.8 g and 2.4 g packets to market a generic equivalent of Renvela® for Oral Suspension, 0.8 g and 2.4 g Packets of Genzyme. This product will be manufactured at Lupin's Goa facility in India.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	41.8	(98.0)	(19.9)
MF(INR cr)	948.6	1,181.3	564.0

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	46,354	45,709	69,329
F&O(INR cr)	4,678,639	7,847,385	5,946,727

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.0	22.9	18.5
NSE VIX	16.2	17.4	16.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	34,857	(0.9) %	3.0 %	Energy	22,589	(1.2) %	22.0 %
IT	37,728	1.0 %	45.2 %	Pharma	13,491	(1.1) %	9.0 %
Metals	5,493	(0.5) %	31.1 %	Finance	16,957	(0.9) %	6.6 %
Auto	10,621	(1.0) %	6.0 %	PSU	2,497	(1.9) %	12.7 %
FMCG	36,914	(0.2) %	5.8 %	Real Estate	477	(1.5) %	42.1 %

### 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>
HCL Techno	1,265	3.1 %	26.2 %	Biocon	354	(5.3) %	(13.7) %
Tech Mahin	1,724	2.4 %	73.7 %	Torrent Ph	3,046	(3.7) %	19.5 %
SBI Life I	1,148	2.0 %	30.0 %	Cholaman.I	520	(3.6) %	(7.5) %
L & T Info	7,167	1.9 %	74.2 %	Punjab Nat	37	(3.0) %	(3.5) %
Adani Ente	1,698	1.3 %	53.4 %	Adani Tran	1,768	(3.0) %	77.0 %

### 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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