



28 Sep.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,855	0.0 %	20.1 %
BSE SENSEX	60,078	0.0 %	20.5 %
CNX BANK	38,171	0.0 %	12.7 %
CNX MIDCAP	30,152	0.0 %	25.0 %
CNX SMALLCAP	10,823	0.0 %	30.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,869	0.2 %	13.9 %
S&P 500	4,443	(0.3) %	18.3 %
FTSE 100	7,063	0.2 %	7.5 %
HANG SENG	24,209	0.1 %	(11.9) %
NIKKEI	30,240	(0.0) %	10.9 %
SHANGHAI COMPOSITE	3,583	(0.8) %	2.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.64	(0.1) %	0.9 %
EUR/USD	1.17	(0.0) %	(4.4) %
GBP/USD	1.37	0.2 %	0.1 %
USD/JPY	110.75	1.1 %	7.3 %
USD/AUD	1.38	0.0 %	6.4 %
USD/SGD	1.35	0.2 %	2.5 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	75	2.0 %	58.4 %
Gold(INR/10g)	45,989	(0.1) %	(9.8) %
Gold Comex(USD/oz)	1,753	0.1 %	(10.1) %
SILVER(INR/1Kg)	60,288	(0.2) %	(12.4) %
Aluminium(USD/MT)	2,888	(0.6) %	43.4 %
Copper(USD/MT)	9,341	0.7 %	18.0 %

**FIXED INCOME**

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

**Global Economy:** New orders for US manufactured durable goods increased in the month of August, according to a report released the Commerce Department on Monday. The report said durable goods orders jumped by 1.8% in August after rising by a revised 0.5% in July. Eurozone money supply growth accelerated in August, while credit to the private sector slowed further, data published by the European Central Bank showed on Monday. The broad money supply M3 grew 7.9% year-on-year in August, following July's 7.6% increase. M3 was forecast to advance 7.8%. Likewise, growth in the narrow measure M1 increased to 11.1% from 11% a month ago. Data showed that credit to the private sector logged an annual growth of 3.1%, slower than the 3.4% increase in July. Inflation in the euro zone could exceed the European Central Bank's already raised projections but there are few signs of this already happening, ECB President Christine Lagarde said on Monday. Japan's leading index, which measures the future economic activity, fell to 104.1 in July from 104.6 in June, final data from the Cabinet Office showed on Monday. The coincident index decreased to 94.4 in July from 94.6 in the previous month. The lagging index declined to 95.3 in July from 94.2 in the prior month. According to the initial estimate, the reading was 93.8.

**Global Equities:** The US stocks saw choppy moves in last session as markets eyed rising yields and worries over the US fiscal policy.

**Indian Economy:** The Centre will borrow Rs 5.03 lakh crore in the second half (October-March) of 2021-22, and will stick to the Rs 12.05 lakh crore borrowing target for the year in spite of absorbing additional loans in lieu of goods and service tax compensation shortfall to states. During the first half, the government borrowed Rs 7.02 lakh crore through securities or G-Secs, the Finance Ministry said in a statement. According to the 2021-22 Union Budget, the government's gross borrowing was estimated at Rs 12.05 lakh crore, while net borrowing was pegged at Rs 9.37 lakh crore in the financial year beginning April 1.

**Equity Markets:** Benchmark indices ended a volatile trading session on a flat note on Monday. The Nifty closed near the 17,850 level. Realty, auto, banking and financial shares saw demand while IT, FMCG and pharmaceutical shares witnessed selling pressure.

**Corporate News:** Housing Development Finance Corporation (HDFC) will raise up to Rs 6,000 crore by issuing bonds on a private placement basis to augment its long term resources. The bonds in the nature of secured redeemable non-convertible debentures (NCDs) have a base issue size of Rs 3,000 crore with the option to retain oversubscription up to Rs 3,000 crore. Raymond Ltd on Monday said its board has approved a consolidation exercise, including the combination of its tools and hardware, and auto components businesses with its engineering business to improve synergies and explore monetisation options.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	77.4	90.5	13.8
MF(INR cr)	943.5	299.2	419.0

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	73,920	70,516	70,427
F&O(INR cr)	4,189,420	6,508,822	5,185,927

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.8	19.1	17.9
NSE VIX	18.1	15.2	16.2

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	38,171	0.9 %	12.7 %	Energy	22,006	1.3 %	18.8 %
IT	36,034	(2.9) %	38.7 %	Pharma	14,157	(0.9) %	14.4 %
Metals	5,504	0.1 %	31.4 %	Finance	18,707	0.4 %	17.6 %
Auto	10,765	3.2 %	7.4 %	PSU	2,369	0.5 %	7.0 %
FMCG	40,721	(0.9) %	16.8 %	Real Estate	516	3.0 %	53.8 %

### 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	7,403	6.5 %	6.9 %	HCL Techno	1,295	(4.6) %	29.2 %
Adani Ente	1,531	4.8 %	38.3 %	L & T Info	5,980	(4.0) %	45.4 %
Tata Motor	332	4.3 %	7.8 %	Apollo Hos	4,566	(3.5) %	57.8 %
M & M	811	4.1 %	0.5 %	Divi's Lab	4,933	(3.4) %	36.4 %
Bosch	15,797	3.5 %	11.4 %	Wipro	654	(3.3) %	57.0 %

### 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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