



28 Oct.2021

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	18,211	(0.3) %	22.5 %
BSE SENSEX	61,143	(0.3) %	22.2 %
CNX BANK	40,874	(0.9) %	20.7 %
CNX MIDCAP	31,126	0.1 %	29.1 %
CNX SMALLCAP	11,021	0.3 %	33.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,491	(0.7) %	16.0 %
S&P 500	4,552	(0.5) %	21.2 %
FTSE 100	7,253	(0.3) %	10.4 %
HANG SENG	25,629	(1.6) %	(6.7) %
NIKKEI	29,098	(0.0) %	6.7 %
SHANGHAI COMPOSITE	3,562	(1.0) %	1.7 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.97	0.2 %	2.8 %
EUR/USD	1.16	(0.1) %	(5.2) %
GBP/USD	1.38	0.2 %	0.9 %
USD/JPY	113.69	0.2 %	10.2 %
USD/AUD	1.34	(0.3) %	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)	47,697	(0.6) %	(6.5) %
Gold Comex(USD/oz)	1,796	(0.8) %	(7.9) %
SILVER(INR/1Kg)	64,343	(1.4) %	(6.6) %
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:** After reporting a sharp increase in new orders for US manufactured durable goods in the previous month, the Commerce Department released a report on Wednesday showing durable goods orders pulled back in the month of September. The Commerce Department said durable goods orders fell by 0.4% in September after jumping by a downwardly revised 1.3% in August. China's industrial profits in September rose 16.3% on year to 738.74 billion yuan, following a 10.1% rise in August, even as surging raw material prices and supply bottlenecks squeezed margins and weighed on factory activity. For the January-September period, industrial firms' profits grew 44.7% year-on-year, slowing from a 49.5% increase in the first eight months of 2021, the statistics bureau said on Wednesday. German consumer confidence is set to improve in November on increasing propensity to consume, survey results from the market research group Gfk showed on Wednesday. The forward-looking consumer confidence index rose to 0.9 in November from revised 0.4 in October. The propensity to buy increased again, while economic and income expectations declined considerably in October. Australia's core inflation accelerated more than expected in the third quarter, data from the Australian Bureau of Statistics showed on Wednesday. The weighted median measure of core inflation accelerated to 2.1% from 1.6% in the second quarter. The expected rate was 1.8%. This was the strongest inflation since 2015.

**Global Equities:** The US stocks saw a mixed outing though tech space remained supported on strong earnings.

**Indian Economy:** Refunds of over Rs 1,02,952 crore have been issued to the taxpayers during the current financial year, the Central Board of Direct Taxes (CBDT) stated. This includes income tax refunds of Rs 27,965 crore in 76,21,956 cases and corporate tax refunds of Rs 74,987 crore in 1,70,424 cases.

**Equity Markets:** The main indices ended at the day's low amid heavy selling in late trade. The Nifty ended near the 18,200 mark. Private banking, metal and media stocks saw selling while PSU banks, pharmaceutical and IT stocks edged higher.

**Corporate News:** Larsen & Toubro recorded 56% year-on-year growth in consolidated adjusted profit at Rs 1,723 crore in the September 2021 quarter, driven by higher profits in the IT&TS portfolio and improved margins from the projects & manufacturing portfolio. The reported profit for the quarter at Rs 1,819.45 crore declined by 67 percent compared to Rs 5,520.27 crore in the year-ago period. The company's consolidated revenue was at Rs 34,773 crore, registering a 12% YoY growth. India's largest passenger vehicle manufacturer Maruti Suzuki India Limited (MSIL) declared its results for the second quarter. It has reported a standalone profit after tax of Rs 475 crore for the quarter, decreasing 65% from Rs 1,372 crore reported in the same quarter last year. On a sequential basis, profit improved marginally by 7 percent from Rs 441 crore reported in the June 2021 quarter. The company managed to improve its standalone revenues from operations by 10 percent to Rs 20,539 crore for the quarter, compared to Rs 18,745 crore in September 2020 quarter. On a sequential basis, the revenues soared 16% from Rs 17,771 crore.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(303.6)	(60.7)	1.7
MF(INR cr)	2,331.2	163.9	395.8

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	75,168	88,680	73,019
F&O(INR cr)	6,336,051	6,646,853	5,451,103

### 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	40,874	(0.9) %	20.7 %	Energy	24,185	(0.8) %	30.6 %
IT	35,504	1.0 %	36.7 %	Pharma	14,094	0.9 %	13.9 %
Metals	5,742	(1.5) %	37.1 %	Finance	19,505	(0.7) %	22.6 %
Auto	11,395	(0.5) %	13.7 %	PSU	2,938	2.0 %	32.7 %
FMCG	38,946	0.3 %	11.7 %	Real Estate	516	0.3 %	53.6 %

### 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>
United Spi	883	5.8 %	58.1 %	Axis Bank	788	(6.5) %	10.4 %
Godrej Con	1,010	4.8 %	39.0 %	Bajaj Fina	7,482	(4.8) %	41.9 %
Asian Pain	3,095	4.2 %	21.3 %	Vedanta	315	(4.6) %	36.4 %
UPL	742	4.0 %	13.4 %	Torrent Ph	2,821	(4.2) %	10.7 %
Avenue Sup	4,733	3.6 %	62.5 %	Jindal Ste	430	(3.4) %	16.0 %

### 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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