



29 Sep.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,749	(0.6) %	19.4 %
BSE SENSEX	59,668	(0.7) %	19.3 %
CNX BANK	37,945	(0.6) %	12.1 %
CNX MIDCAP	29,951	(0.7) %	24.2 %
CNX SMALLCAP	10,765	(0.5) %	30.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,300	(1.6) %	12.1 %
S&P 500	4,353	(2.0) %	15.9 %
FTSE 100	7,028	(0.5) %	6.9 %
HANG SENG	24,500	1.2 %	(10.8) %
NIKKEI	30,184	(0.2) %	10.7 %
SHANGHAI COMPOSITE	3,602	0.5 %	2.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.64	(0.0) %	0.9 %
EUR/USD	1.17	(0.0) %	(4.4) %
GBP/USD	1.37	(0.2) %	0.1 %
USD/JPY	110.75	0.6 %	7.3 %
USD/AUD	1.38	0.4 %	6.4 %
USD/SGD	1.35	0.3 %	2.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	75	2.0 %	58.4 %
Gold(INR/10g)	45,778	(0.5) %	(10.3) %
Gold Comex(USD/oz)	1,753	0.1 %	(10.1) %
SILVER(INR/1Kg)	59,585	(1.2) %	(13.5) %
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: A report released by the Conference Board on Tuesday unexpectedly showed a continued deterioration in US consumer confidence in the month of September. The Conference Board said its consumer confidence index fell to 109.3 in September from an upwardly revised 115.2 in August. Federal Reserve Chair Jerome Powell stated that inflation will remain elevated in the coming months before moderating in his remarks to the Senate Banking Committee. China's industrial profits continued to grow at a slower pace as higher input prices as well as shortage of materials lifted production cost, the National Bureau of Statistics reportedly said Tuesday. Industrial profits increased 10.1% year-on-year in August, following an annual growth of 16.4% in July. During January to August period, industrial profits advanced 49.5% from the same period last year. German economic output is likely to grow more strongly in the third quarter than in the spring, the experts noted. Nonetheless, the central bank estimated that it will not reach the pre-crisis level of the fourth quarter of 2019 in the summer due to the supply-side difficulties in industry. Germany's inflation is likely to rise sharply from the current level due to the VAT reduction in the previous year, Bundesbank said in its monthly report on Monday. "From today's perspective, rates between 4% and 5% are temporarily possible from September until the end of the year" the bank said. The central bank said the German economy continued the recovery that began in the spring at a faster pace.

Global Equities: The US stocks slumped on Tuesday with rising bond yields hurting the sentiments and inflicting heavy losses for major indices.

Indian Economy: Only manufacturing companies registered in India will be eligible to participate under the recently approved Rs 10,683-crore production-linked incentive (PLI) scheme for the textiles sector, according to a notification of the textiles ministry. Notifying the scheme, the ministry also said that participating companies will have to undertake processing and operation activities in their own factory premises. The turnover achieved from trading and outsourced job work will not be accounted for while calculating claims for availing the incentive.

Equity Markets: The key equity indices ended with steep losses on Tuesday, snapping their three-day rising streak. The Nifty managed to close near the 17,750 level after hitting an intraday low of 17,576.10 in mid afternoon trade. PSU banks rallied while IT shares corrected.

Corporate News: IT counters could be in focus as the Indian Rupee stayed slippery on firm US dollar. INR broke above the 74 mark, testing around one month low. Atul Auto will be in focus as the commercial production at the Bhayla plant in Ahmedabad of the company for manufacturing three-wheelers was commenced on September 27. Lupin launched Droxidopa capsules, a generic equivalent of Northera capsules of Lundbeck NA, in the United States. The drug is used for the treatment of orthostatic dizziness and lightheadedness



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(56.9)	82.3	13.2
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)	77,313	70,894	70,484
F&O(INR cr)	7,321,181	6,551,578	5,203,429

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.8	19.1	17.9
NSE VIX	18.5	15.4	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	37,945	(0.6) %	12.1 %	Energy	22,449	2.0 %	21.2 %
IT	35,240	(2.2) %	35.6 %	Pharma	14,172	0.1 %	14.5 %
Metals	5,535	0.5 %	32.1 %	Finance	18,535	(0.9) %	16.5 %
Auto	10,696	(0.6) %	6.7 %	PSU	2,398	1.2 %	8.3 %
FMCG	40,683	(0.1) %	16.7 %	Real Estate	501	(3.0) %	49.1 %

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>
HPCL	292	5.0 %	22.7 %	Gland Phar	3,678	(4.4) %	49.0 %
Power Grid	184	4.5 %	12.1 %	Bajaj Hold	4,799	(3.9) %	43.7 %
Coal India	175	4.5 %	32.1 %	Bharti Air	696	(3.7) %	36.2 %
NTPC	132	4.0 %	22.3 %	L & T Info	5,771	(3.5) %	40.3 %
IOCL	123	3.6 %	32.0 %	Tech Mahin	1,414	(3.4) %	42.5 %

EVENTS CALENDAR

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

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