



29 Oct.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,833	(0.1) %	19.9 %
BSE SENSEX	59,985	(1.9) %	19.6 %
CNX BANK	39,425	(0.2) %	16.4 %
CNX MIDCAP	30,308	(0.7) %	25.7 %
CNX SMALLCAP	10,779	(0.4) %	30.1 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,730	0.7 %	16.7 %
S&P 500	4,596	1.0 %	22.4 %
FTSE 100	7,249	(0.1) %	10.3 %
HANG SENG	25,556	(0.3) %	(7.0) %
NIKKEI	28,820	(1.0) %	5.7 %
SHANGHAI COMPOSITE	3,518	(1.2) %	0.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.95	(0.0) %	2.7 %
EUR/USD	1.16	(0.2) %	(5.4) %
GBP/USD	1.37	(0.2) %	0.7 %
USD/JPY	113.84	0.1 %	10.3 %
USD/AUD	1.33	(0.4) %	2.6 %
USD/SGD	1.35	0.1 %	2.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	83	0.2 %	73.9 %
Gold(INR/10g)	47,876	0.4 %	(6.1) %
Gold Comex(USD/oz)	1,803	0.4 %	(7.5) %
SILVER(INR/1Kg)	64,550	0.3 %	(6.3) %
Aluminium(USD/MT)	2,721	0.6 %	35.1 %
Copper(USD/MT)	9,860	0.1 %	24.5 %

FIXED INCOME

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

Global Economy: The US real gross domestic product increased by 2% in the third quarter after jumping by 6.7% in the second quarter, according to preliminary data released by the Commerce Department on Thursday. This slowdown in GDP growth came as consumer spending rose by just 1.6% in the third quarter after spiking by 12% in the second quarter. Spending on durable goods plummeted by 26.2% in the third quarter after surging by 11.6% in the second quarter, while growth in spending on services also slowed to 7.9% from 11.5%. US pending home sales showed a notable pullback in the month of September after spiking in August, according to a report released by the National Association of Realtors on Thursday. NAR said its pending home sales slumped by 2.3% to 116.7 in September after surging 8.1% to 119.4 in August. A pending home sale is one in which a contract was signed but not yet closed. The European Central Bank left its key interest rates and its forward guidance on asset purchases unchanged on Thursday, in line with expectations, amid concerns over high inflation.

The Governing Council, led by ECB President Christine Lagarde, left its key interest rate, the main refinancing rate, unchanged at zero, the deposit rate at -0.50% and the marginal lending rate at 0.25%. Policymakers expect key interest rates to remain at their present or lower levels until it sees inflation reaching two per cent well ahead of the end of its projection horizon and durably for the rest of the projection horizon.

Global Equities: The Nasdaq and the S&P 500 reached new record closing highs on excellent buying support.

Indian Economy: India's Gold Jewellery demand in India in Q3 increased approximately 60% both q-o-q and y-o-y, due to strong pent-up demand, a rebound in economic activity and lower gold prices, according to a latest update from the World Gold Council (WGC). Having been locked down for much of Q2 to combat the severe second wave of COVID-19, jewellery demand bounced back sharply in the third quarter. An acceleration in the vaccination programme and a strong end to the monsoon season further boosted consumer sentiment. Total jewellery demand in third quarter stood at 96.2 tonnes compared to around 61 tonnes in same quarter last year.

Equity Markets: The local indices ended with steep losses on Thursday amid weak global cues. The BSE Sensex slipped below the psychological mark of 60,000 while the Nifty fell below the crucial 18,000 mark. Investors also squared off positions ahead of the monthly F&O expiry today. All sectoral indices on the NSE closed in the red with realty, metal, PSU banks stocks losing the most.

Corporate News: NTPC reported consolidated net profit of Rs 3690.95 crore in Q2FY22 against Rs 3494.61 crore in Q2FY21. Total income rose to Rs 33095.67 crore from Rs 28677.64 crore YoY. Tata Power Company's consolidated net profit surged 36% to Rs 506 crore in Q2 FY22 from Rs 370.93 crore posted in Q2 FY21. Consolidated revenue rose 13% year on year to Rs 9,502 crore due to expanded operation in Odisha DISCOMs and higher project execution by Tata Power Solar Systems (TPSSL) and strong business performance of all other businesses. Wipro in partnership with Oracle, launched Wipro Tollway Transportation and Billing solution to enhance commuters' experience while improving profitability for tollway authorities.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(242.7)	(71.4)	(0.1)
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)	81,069	88,280	73,076
F&O(INR cr)	14,932,456	7,082,937	5,517,406

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	18.0	18.0
NSE VIX	17.9	16.9	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	39,509	(3.3) %	16.7 %	Energy	23,581	(2.5) %	27.4 %
IT	34,914	(1.7) %	34.4 %	Pharma	13,781	(2.2) %	11.3 %
Metals	5,545	(3.4) %	32.4 %	Finance	18,988	(2.7) %	19.3 %
Auto	11,261	(1.2) %	12.4 %	PSU	2,785	(5.2) %	25.7 %
FMCG	38,209	(1.9) %	9.6 %	Real Estate	497	(3.8) %	47.9 %

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>
IndusInd B	1,176	2.9 %	18.4 %	Adani Ente	1,399	(10.7) %	26.3 %
Ambuja Cem	390	2.1 %	25.4 %	Punjab Nat	41	(10.7) %	8.2 %
Gland Phar	3,593	2.0 %	45.6 %	Adani Port	688	(7.7) %	(6.5) %
ACC	2,288	1.7 %	19.6 %	Lupin	882	(5.9) %	(14.1) %
Larsen & T	1,814	1.7 %	25.6 %	ITC	225	(5.6) %	2.3 %

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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