



29 Nov.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,026	(2.9) %	14.5 %
BSE SENSEX	57,107	(2.9) %	14.1 %
CNX BANK	36,026	(3.6) %	6.4 %
CNX MIDCAP	29,920	(3.3) %	24.1 %
CNX SMALLCAP	10,771	(2.9) %	30.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,899	(2.5) %	14.0 %
S&P 500	4,595	(2.3) %	22.3 %
FTSE 100	7,044	(3.6) %	7.2 %
HANG SENG	24,081	(2.7) %	(12.3) %
NIKKEI	28,752	(2.5) %	5.5 %
SHANGHAI COMPOSITE	3,564	(0.6) %	1.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.42	0.0 %	2.0 %
EUR/USD	1.12	(0.0) %	(8.6) %
GBP/USD	1.33	(0.2) %	(2.4) %
USD/JPY	115.36	0.1 %	11.8 %
USD/AUD	1.39	0.2 %	7.2 %
USD/SGD	1.37	0.1 %	3.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	(17.1) %	43.1 %
Gold(INR/10g)	48,153	1.3 %	(5.6) %
Gold Comex(USD/oz)	1,794	(0.2) %	(8.0) %
SILVER(INR/1Kg)	63,374	0.5 %	(8.0) %
Aluminium(USD/MT)	2,619	(4.5) %	30.0 %
Copper(USD/MT)	9,630	(3.0) %	21.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	(0.1) %	0.6 %

Global Economy: South Africa has detected a new COVID-19 variant with a large number of mutations. Concerns grow about the new variant which could be more infectious than Delta and more resistant to current vaccines. The variant has been termed as Omicron and was first reported to WHO from South Africa on 24 November 2021. Germany's import price inflation rose to the highest since early 1980 due to second oil price crisis, data published by Destatis revealed on Friday. Import prices grew 21.7% yearly in October, following 17.7% in September. UK car production declined by 41.4% in October as factories turned out 64,729 units, according to the latest figures released today by the Society of Motor Manufacturers and Traders (SMMT). It was the fourth straight month of decline and the weakest October since 1956 as car makers blamed the global shortage of semiconductors which led to production stoppages. Despite the overall decline, battery electric (BEV) manufacturing rose 17.5% to 8,454 units. Year-to-date output is below 2020, down 2.9% to 721,505 units, compared with a year badly affected by factory stoppages arising from the first lockdowns. November was a strong sales period for UK retailers as consumers started shopping for Christmas early, with selling prices also growing at the fastest pace since 1990, according to the latest quarterly Distributive Trades Survey by the Confederation of British Industry. The survey of 125 companies, including 51 retailers, found that year-on-year retail sales growth accelerated in November by +39% from +30% the previous month, while quarterly questions found that retail selling prices increased at the fastest pace since May 1990 by +77%. Singapore's industrial production rose in October, data from the Economic Development Board showed on Friday. Industrial output gained 16.9% year-on-year in October, after a 2.2% fall in September. Excluding biomedical manufacturing, industrial production gained 9.4% yearly in September, after a 13.5% gain in the preceding month. On a monthly basis, industrial production rose 2.4% in October, after a 1.9% decline in the previous month.

Global Equities: Global stocks tumbled on Friday on heavy risk aversion amid worries over new variant of Covid-19. The US indices fell to their lowest closing levels in at last one month.

Indian Economy: Area sown to wheat, the main rabi crop, rose 3.36% to 138.35 lakh hectare so far in the current rabi season from 133.84 lakh hectare in the year-ago period, according to the agriculture ministry. Wheat has been sown in 35.8 lakh hectare in Madhya Pradesh, 34.98 lakh hectare in Uttar Pradesh, 29.45 lakh hectare in Punjab, 13.78 lakh hectare in Haryana and 13.37 lakh hectare in Rajasthan so far in the ongoing season. Total area sown to rabi crops was 346.13 lakh hectare so far this rabi season of 2021-22 crop year, up from 322.70 lakh hectare in the year-ago period.

Equity Markets: The benchmark indices ended with sharp cuts on Friday, tracking dismal global cues amid renewed COVID-19 fears over a new variant found in South Africa. The Nifty ended near 17,000 mark. Barring the pharma and healthcare indices, all the sectoral indices on the NSE ended in the red. Auto, metal and realty shares slumped.

Corporate News: Oil and Gas shares will be in focus as WTI Crude lost around 13% on Friday to test lowest level in three months. The Cellular Operators' Association of India (COAI) which represents the private telcos has asked the telecom department to reduce base prices of 5G airwaves by more than half, if it wants a successful auction. ITC said it will acquire a 16% stake in Mother Sparsh, a D2C Ayurvedic and natural personal care brand, for Rs 20 crore through a share subscription agreement. Mother Sparsh is a premium Ayurvedic and natural personal care start-up in the D2C space, focusing on mother and baby care segments.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(23.1)	57.7	(0.9)
MF(INR cr)	(353.4)	795.1	448.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	86,817	65,860	72,335
F&O(INR cr)	5,247,348	7,362,792	5,724,290

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	28.6	18.0	18.0
NSE VIX	20.8	16.5	16.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	36,026	(3.6) %	6.4 %	Energy	23,349	(3.6) %	26.1 %
IT	34,606	(2.0) %	33.2 %	Pharma	13,797	1.7 %	11.5 %
Metals	5,324	(5.3) %	27.1 %	Finance	17,615	(3.6) %	10.7 %
Auto	10,760	(4.3) %	7.4 %	PSU	2,629	(4.2) %	18.7 %
FMCG	37,547	(1.9) %	7.7 %	Real Estate	493	(6.3) %	46.8 %

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>
Cipla	967	7.4 %	18.1 %	Bandhan Ba	283	(10.3) %	(19.4) %
Dr Reddy's	4,751	3.5 %	3.6 %	Interglobe	1,888	(8.9) %	16.8 %
Divi's Lab	4,938	2.9 %	36.6 %	JSW Steel	629	(7.7) %	23.6 %
Cadila Hea	473	2.4 %	7.1 %	DLF	377	(7.5) %	29.1 %
Bajaj Hold	5,037	2.0 %	50.9 %	Jindal Ste	354	(7.1) %	(4.4) %

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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