



29 Dec.2021

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,233	0.9 %	15.9 %
BSE SENSEX	57,897	0.8 %	15.7 %
CNX BANK	35,184	0.4 %	3.9 %
CNX MIDCAP	30,095	1.2 %	24.8 %
CNX SMALLCAP	11,040	1.6 %	33.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	36,398	0.3 %	18.9 %
S&P 500	4,786	(0.1) %	27.4 %
FTSE 100	7,372	(0.0) %	12.2 %
HANG SENG	23,281	0.2 %	(15.3) %
NIKKEI	29,069	1.4 %	6.6 %
SHANGHAI COMPOSITE	3,630	0.4 %	3.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.93	(0.3) %	2.7 %
EUR/USD	1.13	(0.2) %	(7.8) %
GBP/USD	0.06	(95.3) %	(95.4) %
USD/JPY	114.45	0.1 %	10.9 %
USD/AUD	1.39	0.2 %	6.8 %
USD/SGD	1.36	0.2 %	3.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	76	2.4 %	58.7 %
Gold(INR/10g)	48,041	0.0 %	(5.8) %
Gold Comex(USD/oz)	1,810	(0.1) %	(7.1) %
SILVER(INR/1Kg)	61,933	1.1 %	(10.1) %
Aluminium(USD/MT)	2,848	0.0 %	41.4 %
Copper(USD/MT)	9,582	0.0 %	21.0 %

FIXED INCOME

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

Global Economy: The U.S. on Monday reported more than half a million new COVID-19 cases – vastly worse than any other single day of the entire pandemic. Monday's tally of more than 500,000 new cases was higher than the nation's previous record of more than 303,000. The apparent spike likely represents some cases backlogged over the Christmas holiday, but it also reflects part of the surge of the highly contagious omicron strain. Japan industrial production climbed a seasonally adjusted 7.2 percent on month in November, the Ministry of Economy, Trade and Industry said on Tuesday, up from the 1.8 percent gain in October. On a yearly basis, industrial production improved 5.4 percent following the 4.1 percent contraction in the previous month. Upon the release of the data, the METI upgraded its assessment of industrial production, saying that it now showing signs of an upward movement. Spain's retail sales grew at the fastest pace in six months in November after declining in the previous month, preliminary data from the statistical office INE showed Tuesday. Japan unemployment rate came in at a seasonally adjusted 2.8 percent in November, the Ministry of Internal Affairs and Communications said on Tuesday. The jobs-to-applications ratio was 1.15, unchanged from the previous month. The participation rate was 62.0. Japan's construction orders grew at a significantly faster annual pace in November compared to the previous month, preliminary data from the Ministry of Land, Infrastructure, Transport and Tourism showed Tuesday. Orders at the big 50 constructors grew 11.6 percent year-on-year following a 2.1 percent increase in October. Demand rose for a third straight month. In September, orders surged 27.3 percent from the same month last year.

Global Equities: The S&P 500 eased from fresh record Tuesday as markets poised for a breath after recent winning spree.

Indian Economy: Creation of a dedicated bad bank is the first step in resolving the long-standing bad-loan problem and would incentivise quicker resolution and help better value realisation, the RBI's Financial Stability Report (FSR) said. Despite several efforts, a substantial stock of legacy NPAs continues to be on the balance sheets of banks, it noted. The Confederation of All India Traders (CAIT) has urged Union Finance Minister Nirmala Sitharaman to defer the hike in the good and services tax (GST) on textiles that is due to come in from January 1, 2022. The government in November notified an increase in GST on natural fibre products from 5% to 12%, including apparels in the lower tax bracket.

Equity Markets: The domestic equity benchmarks ended with significant gains near the day's high on Tuesday. The Nifty, however, failed to close above the 17,250 level. Shares across sectors advanced with autos, PSU banks, consumer durables and oil & gas stocks gaining the most.

Corporate News: Oil and Gas counters will be in focus as crude oil prices stayed elevated after recent spurt. Aurobindo Pharma announced the Drugs Controller General of India's permission to manufacture and market its generic version of Molnupiravir, to be sold as Molnaflu, licensed from MSD and Ridgeback. Natco Pharma received approval for the drug Molnupiravir, which will be sold under the brand name MOLNUNAT, for the treatment of Covid-19 in India.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(95.7)	(94.4)	(20.4)
MF(INR cr)	948.6	1,181.3	564.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	46,982	43,660	68,847
F&O(INR cr)	5,282,518	7,596,778	5,940,147

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.7	22.6	18.5
NSE VIX	16.5	17.3	16.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	35,184	0.4 %	3.9 %	Energy	22,817	1.1 %	23.2 %
IT	38,358	1.0 %	47.6 %	Pharma	13,836	0.9 %	11.8 %
Metals	5,539	0.9 %	32.2 %	Finance	17,179	0.4 %	8.0 %
Auto	10,784	1.3 %	7.6 %	PSU	2,528	1.0 %	14.1 %
FMCG	37,163	0.8 %	6.6 %	Real Estate	483	0.8 %	44.0 %

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>
P I Indust	3,002	3.8 %	33.4 %	P & G Hygi	15,466	(1.0) %	23.1 %
ICICI Lomb	1,389	3.2 %	(3.4) %	Indraprast	479	(1.0) %	(9.0) %
Pidilite I	2,473	3.1 %	35.6 %	Cholaman.I	523	(0.7) %	(7.0) %
Asian Pain	3,368	2.9 %	32.0 %	Adani Tran	1,737	(0.6) %	73.8 %
Ambuja Cem	380	2.8 %	22.3 %	Gland Phar	3,875	(0.5) %	57.0 %

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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