



30 Sep.2021

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,711	(0.2) %	19.1 %
BSE SENSEX	59,413	(0.4) %	18.8 %
CNX BANK	37,743	(0.5) %	11.5 %
CNX MIDCAP	30,274	1.1 %	25.5 %
CNX SMALLCAP	10,809	0.4 %	30.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,391	0.3 %	12.4 %
S&P 500	4,359	0.2 %	16.1 %
FTSE 100	7,108	1.1 %	8.2 %
HANG SENG	24,664	0.7 %	(10.2) %
NIKKEI	29,544	(2.1) %	8.4 %
SHANGHAI COMPOSITE	3,536	(1.8) %	1.0 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.69	0.1 %	1.0 %
EUR/USD	1.17	(0.1) %	(4.6) %
GBP/USD	1.37	0.2 %	0.3 %
USD/JPY	110.86	0.1 %	7.4 %
USD/AUD	1.37	(0.4) %	5.9 %
USD/SGD	1.35	(0.1) %	2.4 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	75	(0.2) %	58.1 %
Gold(INR/10g)	46,054	0.6 %	(9.7) %
Gold Comex(USD/oz)	1,738	(0.8) %	(10.8) %
SILVER(INR/1Kg)	60,061	0.8 %	(12.8) %
Aluminium(USD/MT)	2,899	0.4 %	44.0 %
Copper(USD/MT)	9,263	(0.8) %	17.0 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	0.1 %	0.6 %

**Global Economy:** After reporting two straight monthly decreases in US pending home sales, the National Association of Realtors (NAR) released a report on Wednesday showing pending home sales soared in the month of August. NAR said its pending home sales soared by 8.1% to 119.5 in August after tumbling by 2% to a revised 110.5 in July. Eurozone economic sentiment edged higher to 117.8 in September, from 117.6 in August, after hitting an all-time high of 119.0 in July, the European Commission's data showed. But Commission data showed sentiment in industry improved to 14.1 from 13.8 in August, though it did decline in services to 15.1 from 16.8. Consumers became more optimistic as well, with a reading of -4.0, up from -5.3 in August, and in the construction sector the indicator rose to 7.5 from 5.5, helping offset the decline in the retail sector to 1.3 from 4.6. Germany's import prices grew 16.5% on a yearly basis in August, after rising 15% in July, due to higher energy prices, data published by Destatis revealed on Wednesday. This was the highest annual rate seen since September 1981, when prices were up 17.4%. Month-on-month, import prices were up 1.4%, following a 2.2% rise in July. UK mortgage approvals dipped down in August to 74,500 from 75,100 in July, according to the latest Money and Credit statistics from the Bank of England. This is the lowest since July 2020, but remains above pre-February 2020 levels. Hong Kong's merchandise exports rose at a softer pace in August, data from the Census and Statistics Department showed on Tuesday. Exports rose 25.9% year-on-year in August, after a near 27% increase in July. Imports edged 28.1% annually in August, after a 26.1% gain in the previous month.

**Global Equities:** The US stocks mostly stayed supported but US government shutdown worries capped gains.

**Indian Economy:** The government has now announced some modifications in the Emergency Credit Line Guarantee Scheme (ECLGS) to enable support to businesses impacted by the second wave of COVID. Existing borrowers under ECLGS 1.0 & 2.0 would be eligible for additional credit support of upto 10% of total credit outstanding as on 29.02.2020 or 31.03.2021, whichever is higher. Businesses who have not availed assistance under ECLGS (ECLGS 1.0 or 2.0), can avail credit support of upto 30% of their credit outstanding as on 31.03.2021. Businesses in sectors specified under ECLGS 3.0, who have previously not availed ECLGS, can avail credit support up to 40% of their credit outstanding as on 31.03.2021, to the maximum of Rs.200 crore per borrower.

**Equity Markets:** Key indices ended with modest losses on Wednesday. The Nifty held above 17,700 mark after hovering in a range of 17,608.15 and 17,781.75. A spike in U.S. benchmark bond yields and a strong dollar capped gains in equities.

**Corporate News:** Persistent Systems will be in focus as its US subsidiary acquired Software Corporation and its affiliate Fusion360. The company also entered into an agreement with Shree Infosoft, India to acquire its business. Blue Dart Express announced its general price increase, effective from January 2022. The average shipping price increase will be 9.6% compared to 2021. Bajaj Auto and the promoters of KTM have finalised a share swap deal which would lead to the Indian company hold stake in a KTM Group company that holds equity in a listed entity of the Austrian bike maker.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(254.5)	64.6	10.9
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)	92,917	72,053	70,667
F&O(INR cr)	6,787,473	6,563,373	5,216,308

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.8	19.0	17.9
NSE VIX	18.8	15.6	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	37,743	(0.5) %	11.5 %	Energy	22,865	1.8 %	23.5 %
IT	35,283	0.1 %	35.8 %	Pharma	14,405	1.6 %	16.4 %
Metals	5,661	2.3 %	35.1 %	Finance	18,371	(0.9) %	15.5 %
Auto	10,656	(0.4) %	6.3 %	PSU	2,463	2.7 %	11.2 %
FMCG	40,472	(0.5) %	16.1 %	Real Estate	506	1.1 %	50.8 %

### 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>
NTPC	141	6.6 %	30.4 %	HDFC AMC	2,905	(5.5) %	(2.0) %
Coal India	186	6.4 %	40.5 %	Info Edg.(	6,442	(4.6) %	51.1 %
Power Grid	195	6.0 %	18.9 %	Yes Bank	12	(3.5) %	(21.7) %
Jindal Ste	383	5.8 %	3.1 %	Godrej Con	1,022	(2.9) %	40.8 %
Sun Pharma	811	4.7 %	32.8 %	H D F C	2,746	(2.1) %	8.5 %

### 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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