



30 Nov.2021

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,054	0.2 %	14.7 %
BSE SENSEX	57,261	0.3 %	14.5 %
CNX BANK	35,976	(0.1) %	6.3 %
CNX MIDCAP	29,515	(1.4) %	22.4 %
CNX SMALLCAP	10,490	(2.6) %	26.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	35,136	0.7 %	14.8 %
S&P 500	4,655	1.3 %	23.9 %
FTSE 100	7,110	0.9 %	8.2 %
HANG SENG	23,852	(1.0) %	(13.2) %
NIKKEI	28,284	(1.6) %	3.8 %
SHANGHAI COMPOSITE	3,563	(0.0) %	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)	47,964	(0.4) %	(6.0) %
Gold Comex(USD/oz)	1,794	(0.2) %	(8.0) %
SILVER(INR/1Kg)	62,820	(0.9) %	(8.8) %
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:** The US National Association of Realtors (NAR) released a report on Monday showing that pending home sales rebounded. NAR said its pending home sales index surged by 7.5% to 125.2 in October after tumbling by 2.4% to a revised 116.5 in September. The pending home sales index surged to its highest level since last December but was still down by 1.4% compared to the same month a year ago. Eurozone consumer confidence indicator was confirmed at -6.8 in November 2021, down from -4.8 in the previous month, amid concerns over rising COVID-19 cases and the prospect of new pandemic-induced restrictions across the region. It was the lowest reading since April, reflecting a decrease in all its components, i.e., households' assessments of their past and future financial conditions, their intentions to make major purchases and their expectations about the general economic situation. UK mortgage approvals fell sharply in October to their lowest level since June 2020, Bank of England data showed on Monday. Mortgage approvals for house purchase in the United Kingdom dropped further to 67.2 thousand in October 2021, from a revised 71.9 thousand in the previous month. This was the lowest since June 2020, and was close to the 12-month average up to February 2020 of 66.7 thousand. Japan value of retail sales was up 0.9% on year in October, the Ministry of Economy, Trade and Industry said on Monday, coming in at 12.552 trillion yen, following the 0.5% decline in September. The data also showed that wholesale sales jumped 6.6% on year to 34.323 trillion yen, slowing from 8.7% in the previous month. Commercial sales were up 5.0% to 46.875 trillion yen, slowing from 6.2% a month earlier. On a monthly basis, retail sales rose 1.1% following the upwardly revised 2.8% gain in the previous month (originally 2.7%).

**Global Equities:** The US stocks bounced on Monday with tech heavy NASDAQ jumping nearly 2%.

**Indian Economy:** The net direct tax collection grew nearly 68% during April 1 to November 23 to more than Rs 6.92 lakh crore, Minister of State for Finance Pankaj Chaudhary said on Monday. The Net Direct Tax Collection figures for the FY- 2021-22 as on 23.11.2021 are at Rs 6,92,833.6 crores showing a growth of 67.93% and 27.29% over the net collection figures for the corresponding period FY2020-21 and FY 2019-20, he said in a written reply in the Lok Sabha. The net collection between April 1 - November 23 in 2020-21 and 2019-20 fiscals was over Rs 4.12 lakh crore and over Rs 5.44 lakh crore respectively. The gross direct tax collection (before adjusting refunds) as of November 23 stood at over Rs 8.15 lakh crore, a 48.11% growth over the collections in the corresponding period in last fiscal. Under Pradhan Mantri Awas Yojana-Urban (PMAY-U), participating States/Union Territories (UTs) have undertaken a demand survey and assessed a demand of 112.24 lakh houses in urban areas. Against this, a total of 114.06 lakh houses have been sanctioned so far. Of the sanctioned houses, 89.36 lakh houses have been grounded for construction; of which 52.55 lakh houses have been completed/ delivered.

**Equity Markets:** Domestic equity indices ended a volatile trading session with small gains on Monday. The Nifty managed to close above the 17,000 mark after hitting a day's low of 16,782.40 in early trade. IT and consumer durable sector stocks bucked broader weakness. Global cues were mixed amid concerns of a new COVID virus variant.

**Corporate News:** NTPC Renewable Energy, a wholly owned subsidiary company of NTPC, has signed PPA for 325 MW solar projects. The board of directors of Coal India approved payment of interim dividend for the financial year 2021-22 of Rs 9 per share. Union Bank of India informed that the RBI has imposed a penalty of Rs 1 crore on the bank due to non-compliance with RBI's directions on fraud classification and sale of stressed assets. Ratnamani Metals & Tubes has received new domestic orders aggregating to Rs.297.87 crore from the Oil & Gas Sector, to be executed between February 2022 to January 2023.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(495.6)	25.1	(4.1)
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)	75,360	66,360	72,353
F&O(INR cr)	5,606,596	7,270,361	5,723,568

### 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	16.7	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	35,976	(0.1) %	6.3 %	Energy	23,052	(1.3) %	24.5 %
IT	34,871	0.8 %	34.2 %	Pharma	13,649	(1.1) %	10.3 %
Metals	5,305	(0.4) %	26.6 %	Finance	17,630	0.1 %	10.8 %
Auto	10,704	(0.5) %	6.8 %	PSU	2,575	(2.0) %	16.3 %
FMCG	37,325	(0.6) %	7.0 %	Real Estate	485	(1.7) %	44.3 %

### 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>
Gland Phar	3,608	2.9 %	46.2 %	Adani Tran	1,894	(5.0) %	89.6 %
Kotak Mah.	2,020	2.8 %	11.9 %	Bandhan Ba	269	(4.9) %	(23.4) %
HCL Techno	1,133	2.1 %	13.0 %	Cadila Hea	456	(3.6) %	3.3 %
HDFC Life	684	1.9 %	(1.1) %	Piramal En	2,385	(3.5) %	34.0 %
Siemens	2,133	1.8 %	14.8 %	Aurobindo	655	(3.5) %	(25.7) %

### 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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