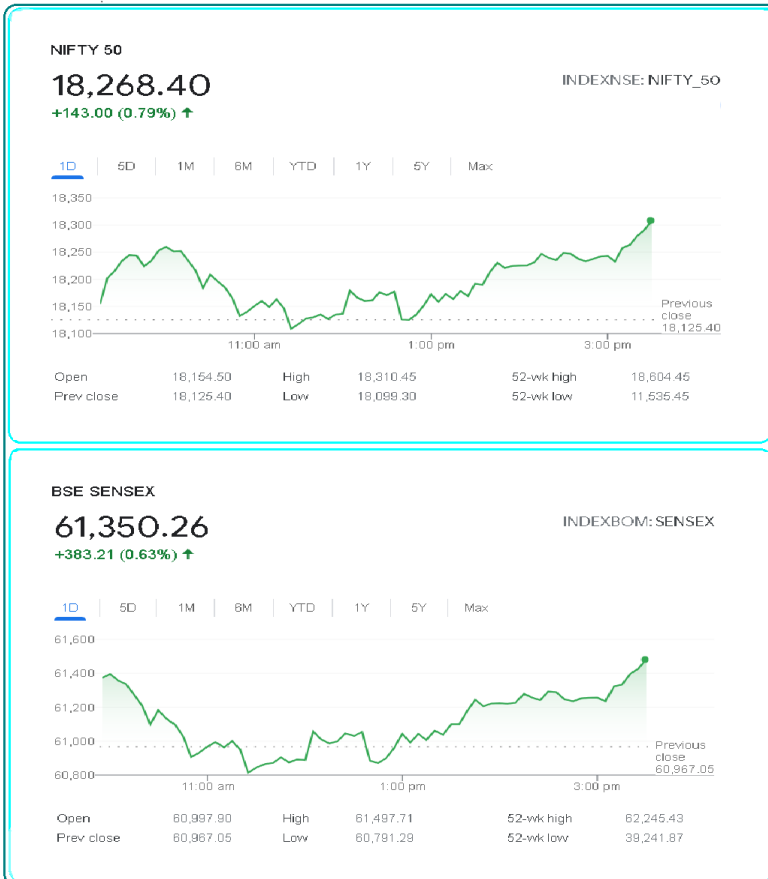


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	18268.40	18125.40	0.79%
S&P BSE SENSEX	61350.26	60967.05	0.63%
NIFTY MID100	31101.95	30553.40	1.80%
NIFTY SML100	10991.15	10716.10	2.57%

(Source: [NSE](#), [BSE](#))

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	41238.30	41192.40	0.11%

Market Wrap Up

- Equity indices ended near the day's high with strong gains amid positive global cues. The Nifty ended above the 18,250 mark after hitting an intraday low of 18,099.30 in mid-morning trade.
- The S&P BSE Sensex, gained 383.21 points or 0.63% to 61,350.26. The Nifty 50 index added 143 points or 0.79% to close at 18,268.40.
- The BSE Mid-Cap index rose 1.75% and the BSE Small-Cap index gained 2.20%.
- Among the sectoral indices on the BSE, the Realty index (up 3.40%), the Metal index (up 2.89%) and the CD index (up 2.80%) outperformed the S&P BSE Sensex. Meanwhile, the Bankex (up 0.18%), the IT index (up 0.29%) and the Power index (up 0.30%) underperformed the S&P BSE Sensex.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed an unwinding of **short** position. Open Interest has been decreased by **34906** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **SBIN**.
- Short** position build up for the **November** series has been witnessed in **AXISBANK**.
- Unwinding** position for the **November** series has been witnessed in **RELIANCE**, **BHARTIARTL**, **ICICIBANK**, **HDFCBANK**, **INFY**.

(Source: Capitaline F&O)

NIFTY AUTO	11452.25	11228.20	2.00%
NIFTY FMCG	38826.85	38491.00	0.87%
NIFTY IT	35162.35	35005.40	0.45%
NIFTY METAL	5830.65	5679.65	2.66%
NIFTY PHARMA	13970.65	13943.85	0.19%
NIFTY REALTY	514.40	496.45	3.62%
BSE CG	26878.36	26648.40	0.86%
BSE CD	44034.70	42836.14	2.80%
BSE Oil & GAS	18853.60	18638.32	1.16%
BSE POWER	3460.64	3450.18	0.30%

(Source: [NSE](#), [BSE](#))

Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	29106.01	28600.41	1.77%
HangSeng	26038.27	26132.03	-0.36%
Straits Times	3204.57	3201.86	0.08%
Shanghai	3597.64	3609.86	-0.34%
Kospi	3049.08	3020.54	0.94%
Jakarta	6656.94	6625.70	0.47%
Taiwan	17034.34	16894.24	0.83%
KLSE Composite	1584.20	1587.94	-0.24%
All Ordinaries	7759.30	7754.30	0.06%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	66652.61	80840.51
NSE F&O	6211648.20	6431092.76

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2368.66

(Source: [NSE](#))

Corporate News

- Axis Bank** reported a healthy 86.2% year-on-year (YoY) growth in standalone profit at Rs 3,133.32 crore for the quarter ended September 2021 (Q2FY22). Profit in the year-ago quarter stood at Rs 1,682.67 crore. NII grew by 7.8% to Rs 7,900 crore compared to the corresponding period last fiscal.
- Canara Bank's** net profit surged 199.86% to Rs 1,332.61 crore on 2.59% increase in total income to Rs 21,331.49 crore in Q2 September 2021 over Q2 September 2020. The bank's profit before tax (PBT) jumped 260.13% to Rs 2,243.41 crore in Q2 September 2021 over Q2 September 2020.
- Cipla Limited** has reported a consolidated profit after tax of Rs. 711 crore for the quarter, increasing by 7% from Rs 644 crore reported in the same quarter last year. It had reported a profit of Rs. 888.34 crore in June-21 quarter. Consolidated revenue came in higher by 10% at Rs 5,520 crore for the quarter, compared to Rs 5,038 crore in September 2020 quarter. Revenues in Q1FY22 stood at Rs 5,504 crore.
- HDFC Asset Management Company Limited** reported 6.75% growth in total revenues for the Sep-21 quarter on consolidated basis at Rs608.40cr. The revenues were higher by just 0.07% on a sequential basis compared to Rs607.99cr revenues in the Jun-21 quarter.
- Bajaj Finance** has clocked a 53.5% year-on-year growth in consolidated profit at Rs 1,481 crore in September 2021 quarter. Consolidated net interest income for the quarter at Rs 5,335 crore grew by 28% compared to the year-ago period.
- Hindustan Zinc Ltd** reported 8.16% growth in total revenues for the Sep-21 quarter on a consolidated basis at Rs6,122cr. The revenues were lower by -6.26% on a sequential basis compared to Rs6,531cr revenues in the Jun-21 quarter. The consolidated profit after tax (PAT) for the Sep-21 quarter was up 3.97% at Rs2,017cr. Profits were up 1.71% compared to the profits in the sequential quarter as profit margins came under pressure.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TATAMOTORS	508.65	479.90	5.99%
TATASTEEL	1343.65	1293.30	3.89%
SBILIFE	1172.05	1129.70	3.75%
TITAN	2454.75	2379.15	3.18%
JSWSTEEL	694.35	674.25	2.98%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INDUSINDBK	1154.90	1177.75	-1.94%
ICICIBANK	829.40	841.70	-1.46%
POWERGRID	190.40	192.65	-1.17%
HINDUNILVR	2436.85	2455.85	-0.77%
NTPC	143.20	143.90	-0.49%

(Source: [Moneycontrol](#))

- **Kansai Nerolac Paints Limited** declared net revenue of Rs1521cr, a growth of 16.2% over the corresponding quarter of the previous year. PAT was at Rs 99 Crores, a de-growth of 38.1% over the same quarter of the previous year.
 - **Kotak Mahindra Bank** reported a 7% year-on-year decline in standalone profit at Rs 2,032 crore for the September 2021 quarter. Standalone net interest income in Q2FY22 rose 3.2% year-on-year to Rs 4,020.6 crore.
 - **Central Bank of India** reported an over 55% jump in net profit at Rs 250 crore for the quarter ended September. The lender had posted a net profit of Rs 161 crore during the same quarter of the previous fiscal. However, total income of the bank during July-September period of 2021-22 was down at Rs 6,503.39 crore, as against Rs 6,762.36 crore in the year-ago period.
 - **Jubilant Pharmova** posted consolidated net sales at Rs 1,657.45 crore in September 2021 down 30.21% from Rs. 2,374.89 crore in September 2020. Net profit at Rs. 142.84 crore in September 2021 down 36.24% from Rs. 224.03 crore in September 2020.
 - **CG Power and Industrial Solutions** posted consolidated net sales at Rs 1,453.79 crore in September 2021 up 118.98% from Rs. 663.89 crore in September 2020. Net profit at Rs. 188.11 crore in September 2021 up 71.99% from Rs. 109.37 crore in September 2020.
 - A new 30-megawatt generator installed at **Tata Steel's** Port Talbot site in South Wales will reduce its energy bill by millions of pounds every year at a time when energy prices are rocketing.
 - **JSW Steel** will be setting up a colour coated steel facility in the Pulwama district of Kashmir with a total investment of Rs 150 crore.
- (Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))
- **Reliance Industries** and bp's fuel and mobility joint venture, Reliance BP Mobility (RBML) on Tuesday launched its first Jio-bp branded Mobility Station at Navde, Navi Mumbai, Maharashtra. Working in a challenging pandemic-affected environment, Jio-bp is bringing a network of world-class Mobility Stations offering multiple fuelling choices to the customers.
 - **Infosys** announced selection as a strategic partner by Posten Norge to digitally transform its IT Service Management function. From this collaboration, Infosys will establish a best-in-class IT Service Desk and adapt Posten Norge's IT processes for new-age software delivery methods.
 - India Post Payments Bank and mortgage lender **HDFC Limited** announced a strategic alliance to offer home loans to nearly 4.7 crore customers of IPPB.
 - **Glenmark Pharmaceuticals** has become the first company in the world to launch a unique fixed dose combination drug for diabetes in India.

Global News

- U.K. CBI retail sales balance rose to 30% in October from 11% in September.
- Spain producer prices grew 23.6% year-on-year in September, after climbing 17.9% in August. On a monthly basis, producer prices gained 5.2% after rising 1.8% in the previous month.
- South Korea's gross domestic product expanded a seasonally adjusted 0.3% on quarter in the third quarter of 2021, down from 0.8% in the previous three months. On an annualized basis, GDP grew 4.0% - slowing from 6.0% in the three months prior.
- Hong Kong's merchandise exports rose 16.5% year-on-year in September, after a 25.9% increase in August. Imports gained 23.5% annually in September, after a 28.1% increase in the previous month. The trade deficit widened to HK\$42.391 billion in September from HK\$12.694 billion in the same month last year. In August, the deficit was HK\$26.298 billion.
- Singapore's industrial production declined 3.4% year-on-year in September, after a 11.0% rise in August. On a monthly basis, industrial production fell 2.8% in September, after a 5.6% gain in the previous month.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

Economic News

- Crude Oil traded at US\$ 84.36/bbl (IST 17:00).
- INR strengthened to Rs. 74.96 from Rs. 75.08 against each US\$ resulting in daily change of 0.16%.
- The government is planning to come up with a semiconductor design-linked incentive policy to promote domestic manufacturing as well as attract global electronic chip companies to the country.
- Dearness Allowance for central government employees has been hiked to 31% of the basic pay from 28% with effect from July 1, 2021, the Finance Ministry said. In an office memorandum, the Department of Expenditure, under the Finance Ministry, said the term 'basic pay' means the pay drawn as per the 7th pay commission matrix and does not include any other type of pay like special pay, etc.
- Indicating signs of improvement, think-tank NCAER said its Business Confidence Index (BCI) increased by 90% in the July-September this financial year over the first quarter.

(Source: [Economic Times](#), [Business Standard](#))

Forthcoming Events

Board Meetings as on 27/10/2021

Adani Enterprises Limited	Financial Results
Adani Ports and Special Economic Zone Limited	Financial Results
Bajaj Auto Limited	Financial Results
IndusInd Bank Limited	Financial Results
ITC Limited	Financial Results
Larsen & Toubro Limited	Financial Results
Lupin Limited	Financial Results
Maruti Suzuki India Limited	Financial Results
SBI Life Insurance Company Limited	Financial Results
Shriram City Union Finance Limited	Financial Results/Dividend
Tata Chemicals Limited	Financial Results
Titan Company Limited	Financial Results
Aegis Logistics Limited	Financial Results
Arvind Limited	Financial Results
Asahi India Glass Limited	Financial Results
Astec LifeSciences Limited	Financial Results
Aarti Drugs Limited	Financial Results
Butterfly Gandhimathi Appliances Limited	Financial Results/Dividend
Cosmo Films Limited	Financial Results
Cummins India Limited	Financial Results
Dalmia Bharat Limited	Financial Results/Dividend
Deepak Nitrite Limited	Financial Results
Eimco Elecon (India) Limited	Financial Results
Exxaro Tiles Limited	Financial Results
Geojit Financial Services Limited	Financial Results
Happiest Minds Technologies Limited	Financial Results/Dividend
HIL Limited	Financial Results
IIFL Finance Limited	Financial Results
Iifl Wealth Management Limited	Financial Results/Dividend
India Grid Trust	Financial Results/Fund Raising
Indian Overseas Bank	Financial Results
KEC International Limited	Financial Results
Kopran Limited	Financial Results
Lakshmi Machine Works Limited	Financial Results
Mahindra Logistics Limited	Financial Results
MAS Financial Services Limited	Financial Results

Oracle Financial Services Software Limited	Financial Results
Orient Bell Limited	Financial Results
Phillips Carbon Black Limited	Financial Results
Poonawalla Fincorp Limited	Financial Results
Praj Industries Limited	Financial Results
PSP Projects Limited	Financial Results
Punjab National Bank	Financial Results
Ramco Systems Limited	Financial Results
Raymond Limited	Financial Results
SIS LIMITED	Financial Results
SKF India Limited	Financial Results
Torrent Power Limited	Financial Results
TTK Prestige Limited	Financial Results/Stock Split
Tube Investments of India Limited	Financial Results
United Breweries Limited	Financial Results
United Spirits Limited	Financial Results
Vardhman Textiles Limited	Financial Results
Welspun India Limited	Financial Results
Welspun Investments and Commercials Limited	Financial Results
Zee Entertainment Enterprises Limited	Financial Results

(Source: NSE)

Corporate Actions as on 27/10/2021

ICICI Securities Limited	Interim Dividend - Rs. 11.25 Per Share
Menon Bearings Limited	Interim Dividend - Rs. 2.00 Per Share

(Source: NSE)

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