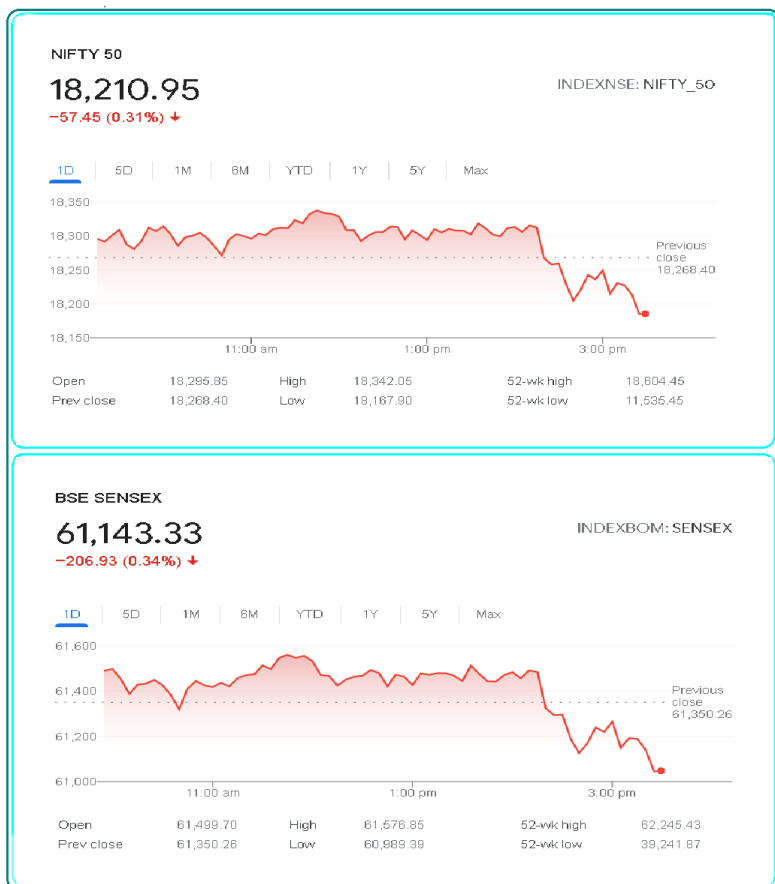


Index Chart



(Source: [Bloomberg](#))

Indian Markets

| Indices | Close | Previous | Change(%) |
|---------------------------|----------|----------|---------------|
| NIFTY 50 | 18210.95 | 18268.40 | -0.31% |
| S&P BSE SENSEX | 61143.33 | 61350.26 | -0.34% |
| NIFTY MID100 | 31125.55 | 31101.95 | 0.08% |
| NIFTY SML100 | 11020.85 | 10991.15 | 0.27% |

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

Sectoral Indices

| Indices | Close | Previous | Change(%) |
|-------------------|----------|----------|---------------|
| NIFTY BANK | 40874.35 | 41238.30 | -0.88% |

Market Wrap Up

- The main indices ended at the day's low amid heavy selling in late trade. The S&P BSE Sensex, fell 206.93 points or 0.34% at 61,143.33. The Nifty 50 index was down 57.45 points or 0.31% at 18,210.95.
- The BSE Mid-Cap index rose 0.02% and the BSE Small-Cap index gained 0.30%.
- Among the sectoral indices on the BSE, the IT index (up 1.01%), the Teck index (up 0.76%) and the Healthcare index (up 0.62%) outperformed the S&P BSE Sensex. Meanwhile, the Metal index (down 1.82%), the Bankex (down 1.12%) and the Energy index (down 0.94%) underperformed the S&P BSE Sensex.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **58943** 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 **RELIANCE, HDFCBANK, HDFC**.
- **Unwinding** position for the **November** series has been witnessed in **ICICIBANK, INFY**.

(Source: Capitaline F&O)

| | | | |
|---------------|----------|----------|--------|
| NIFTY AUTO | 11395.15 | 11452.25 | -0.50% |
| NIFTY FMCG | 38946.10 | 38826.85 | 0.31% |
| NIFTY IT | 35503.90 | 35162.35 | 0.97% |
| NIFTY METAL | 5741.90 | 5830.65 | -1.52% |
| NIFTY PHARMA | 14094.25 | 13970.65 | 0.88% |
| NIFTY REALTY | 515.95 | 514.40 | 0.30% |
| BSE CG | 26864.43 | 26878.36 | -0.05% |
| BSE CD | 44052.13 | 44034.70 | 0.04% |
| BSE Oil & GAS | 18720.78 | 18853.60 | -0.70% |
| BSE POWER | 3458.38 | 3460.64 | -0.07% |

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

Asia Pacific Markets

| Indices | Close | Previous | Change (%) |
|----------------|----------|----------|------------|
| Nikkei225 | 29098.24 | 29106.01 | -0.03% |
| HangSeng | 25628.74 | 26038.27 | -1.57% |
| Straits Times | 3218.17 | 3204.57 | 0.42% |
| Shanghai | 3562.31 | 3597.64 | -0.98% |
| Kospi | 3025.49 | 3049.08 | -0.77% |
| Jakarta | 6602.21 | 6656.94 | -0.82% |
| Taiwan | 17074.55 | 17034.34 | 0.24% |
| KLSE Composite | 1583.08 | 1584.20 | -0.07% |
| All Ordinaries | 7758.00 | 7759.30 | -0.02% |

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

| Market | Current | Previous |
|----------|------------|------------|
| NSE Cash | 70719.28 | 66652.61 |
| NSE F&O | 6335451.86 | 6211648.20 |

(Source: [NSE](#))

FII Activities (Crores)

| ACTIVITIES | Cash |
|------------|---------|
| NET BUY | - |
| NET SELL | 1913.36 |

(Source: [NSE](#))

Corporate News

- Maruti Suzuki India Limited** reported a standalone profit after tax of Rs. 475 crore for the quarter, decreasing 65% from Rs 1,372 crore reported in the same quarter last year. On a sequential basis, profit improved marginally by 7% from Rs. 441 crore reported in June-21 quarter. The standalone revenues from operations improved by 10% to Rs 20,539 crore for the quarter, compared to Rs 18,745 crore in September 2020 quarter. On a sequential basis, the revenues jumped 16% from Rs 17,771 crore.
- Ambuja Cement's** standalone net profit was flat to Rs441cr for the quarter ending September 2021 (Q2FY22) period. However, the company registered a volume growth of 5.9%. Net Sales during the quarter stood at Rs3,193crore compared to Rs2,802cr in the corresponding quarter of the previous year.
- Ceat** posted consolidated net sales at Rs 2,451.76 crore in September 2021 up 23.92% from Rs. 1,978.47 crore in September 2020. Net profit at Rs. 41.98 crore in September 2021 down 76.92% from Rs. 181.86 crore in September 2020.
- Gujarat Mineral Development Corporation** posted consolidated net sales at Rs 451.88 crore in September 2021 up 91.83% from Rs. 235.57 crore in September 2020. Net profit at Rs. 40.46 crore in September 2021 up 238.64% from Rs. 11.95 crore in September 2020.
- Suven Life Sciences** posted consolidated net sales at Rs 1.18 crore in September 2021 down 86.81% from Rs. 8.98 crore in September 2020. Net loss at Rs. 28.30 crore in September 2021 down 80.74% from Rs. 15.66 crore in September 2020.
- Dr Lal PathLabs** posted consolidated net sales at Rs 498.40 crore in September 2021 up 15.4% from Rs. 431.90 crore in September 2020. Net profit at Rs. 95.00 crore in September 2021 up 11.37% from Rs. 85.30 crore in September 2020.
- ICRA** posted consolidated net sales at Rs 82.68 crore in September 2021 up 14.83% from Rs. 72.00 crore in September 2020. Net profit at Rs. 24.06 crore in September 2021 up 30.38% from Rs. 18.45 crore in September 2020.

Top Gainers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|---------|----------|------------|
| ASIANPAINT | 3094.65 | 2969.80 | 4.20% |
| UPL | 741.50 | 713.25 | 3.96% |
| DIVISLAB | 5149.35 | 5018.90 | 2.60% |
| CIPLA | 922.50 | 907.50 | 1.65% |
| INFY | 1728.95 | 1703.70 | 1.48% |

(Source: [Moneycontrol](#))

Top Losers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|----------|----------|------------|
| AXISBANK | 787.50 | 841.90 | -6.46% |
| BAJFINANCE | 7482.15 | 7855.65 | -4.75% |
| ONGC | 157.90 | 163.10 | -3.19% |
| TATAMOTORS | 497.90 | 508.65 | -2.11% |
| BAJAJFINSV | 18012.00 | 18353.35 | -1.86% |

(Source: [Moneycontrol](#))

- **Mahindra Lifespace Developers**, the real estate arm of Mahindra Group, has finalised terms for a joint development on a 4.8-acre land parcel in Mumbai's suburb Dahisar East.
- **MEP Infrastructure Developers Limited** in Joint Venture with Ozoneland Private Limited has received a Letter of Award (LOA) dated October 25, 2021, from the Public Works Department (PWD), Government of Maharashtra for a road project.

- **Symphony** posted consolidated net sales at Rs 220.00 crore in September 2021 up 15.18% from Rs. 191.00 crore in September 2020. Net profit at Rs. 30.00 crore in September 2021 up 87.5% from Rs. 16.00 crore in September 2020.
- **Hikal** posted consolidated net sales at Rs 469.06 crore in September 2021 up 26.12% from Rs. 371.92 crore in September 2020. Net profit at Rs. 44.06 crore in September 2021 up 63.49% from Rs. 26.95 crore in September 2020.
- **Accelya Kale Solutions** posted consolidated net sales at Rs 85.27 crore in September 2021 up 43.57% from Rs. 59.39 crore in September 2020. Net profit at Rs. 14.23 crore in September 2021 up 595.34% from Rs. 2.05 crore in September 2020.
- **IRB Infrastructure Developers** posted consolidated net sales at Rs 1,465.24 crore in September 2021 up 30.44% from Rs. 1,123.32 crore in September 2020. Net profit at Rs. 42.31 crore in September 2021 up 315.19% from Rs. 19.66 crore in September 2020.
- **LKP Securities** posted consolidated net sales at Rs 23.99 crore in September 2021 up 4.66% from Rs. 22.93 crore in September 2020. Net profit at Rs. 3.81 crore in September 2021 down 14.94% from Rs. 4.47 crore in September 2020.

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

Global News

- China's industrial profits surged 16.3% on a yearly basis in September after rising 10.1% in August. During January to September period, industrial profits surged 44.7% from the same period last year to CNY 6.34 trillion.
- U.S. house price index advanced 1.0% from a month earlier in August 2021, following a 1.4% gain in July. Year-on-year, house prices rose 18.5% in August, easing from July's record high of 19.2%.
- U.S. new home sales soared by 14.0% to an annual rate of 800,000 in September after falling by 1.4% to a downwardly revised rate of 702,000 in August.

- U.S. Conference Board said its consumer confidence index climbed to 113.8 in October from an upwardly revised 109.8 in September.
- Germany's import price index climbed 17.7% year-on-year in September following a 16.5% rise in August. Compared to the previous month, the import prices rose 1.3% after a 1.4% increase in August.
- German GfK forward-looking consumer confidence index rose to 0.9 in November from revised 0.4 in October.
- German ifo business confidence index fell more-than-expected to 97.7 in October from revised 98.9 in September. The current situation indicator came in at 100.1, down from 100.4 a month ago. The expectations index dropped to 95.4 from 97.4 in the previous month.
- France's producer price inflation advanced to 11.6% in September from 10.0% in August. On a monthly basis, industrial producer prices gained 1.7%, following August's 1% rise.
- French consumer confidence index fell to 99 in October from 101 in September.
- Australia's core inflation accelerated to 2.1% in the third quarter from 1.6% in the second quarter. On a monthly basis, the underlying measure gained 0.7%.

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

Economic News

- Crude Oil traded at US\$ 83.60/bbl (IST 17:00).
- INR weakened to Rs. 75.02 from Rs. 74.96 against each US\$ resulting in daily change of 0.08%.
- The Union government said it has issued 202 notices to e-commerce players for incorrect declaration of 'country of origin' on products on their platforms in the last one year. The maximum number of such violations were found with respect to electronic appliances, followed by clothing and home products.
- Indicating signs of improvement, think-tank NCAER said its Business Confidence Index (BCI) increased by 90 per cent in the July-September this financial year over the first quarter.
- India's mills need to export 6 to 7 million tonnes of sugar without government incentives in 2021/22 to bring down inventories and ensure domestic prices remain firm despite surplus production.
- Multilateral development bank Asian Infrastructure Investment Bank (AIIB) on Tuesday said it will support India in ramping up its healthcare infra facilities to meet future health challenges. The Beijing-based funding institution said it is working with the Indian government to develop climate-resilient infrastructure projects.

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

Forthcoming Events

Board Meetings as on 28/10/2021

| | |
|---|--------------------------------|
| Bajaj Finserv Limited | Financial Results |
| NTPC Limited | Financial Results |
| InterGlobe Aviation Limited | Financial Results |
| Adani Total Gas Limited | Financial Results |
| Blue Star Limited | Financial Results |
| DLF Limited | Financial Results |
| JK Tyre & Industries Limited | Financial Results |
| Aavas Financiers Limited | Financial Results |
| Adani Green Energy Limited | Financial Results |
| APL Apollo Tubes Limited | Financial Results |
| AU Small Finance Bank Limited | Financial Results |
| Bajaj Holdings & Investment Limited | Financial Results |
| Cartrade Tech Limited | Financial Results |
| CCL Products (India) Limited | Financial Results |
| Chalet Hotels Limited | Financial Results |
| Coromandel International Limited | Financial Results |
| D.B.Corp Limited | Financial Results |
| Dishman Carbogen Amcis Limited | Financial Results |
| Edelweiss Financial Services Limited | Financial Results/Fund Raising |
| EIH Associated Hotels Limited | Financial Results |
| Emkay Global Financial Services Limited | Financial Results |
| Esab India Limited | Financial Results |
| GHCL Limited | Financial Results/Fund Raising |
| GMM Pfaudler Limited | Financial Results/Dividend |
| Gujarat Gas Limited | Financial Results |
| Gujarat Narmada Valley Fertilizers and Chemicals Limited | Financial Results |
| Gujarat State Fertilizers & Chemicals Limited | Financial Results |
| Hindustan Media Ventures Limited | Financial Results |
| HSIL Limited | Financial Results |
| Indian Bank | Financial Results |
| Infibeam Avenues Limited | Financial Results |
| Intellect Design Arena Limited | Financial Results |
| Jindal Stainless (Hisar) Limited | Financial Results |
| Johnson Controls - Hitachi Air Conditioning India Limited | Financial Results |
| JSW Holdings Limited | Financial Results |
| Kirloskar Oil Engines Limited | Financial Results |

| | |
|--|--------------------------------|
| Kokuyo Camlin Limited | Financial Results |
| Laurus Labs Limited | Financial Results/Dividend |
| Mahindra & Mahindra Financial Services Limited | Financial Results |
| Marico Limited | Financial Results/Dividend |
| MMTC Limited | Financial Results |
| Motilal Oswal Financial Services Limited | Financial Results |
| Oriental Carbon & Chemicals Limited | Financial Results/Dividend |
| RBL Bank Limited | Financial Results |
| SBI Cards and Payment Services Limited | Financial Results/Fund Raising |
| Schaeffler India Limited | Financial Results/Stock Split |
| Shree Renuka Sugars Limited | Financial Results |
| Subex Limited | Financial Results |
| Sudarshan Chemical Industries Limited | Financial Results |
| Tata Power Company Limited | Financial Results |
| The Karnataka Bank Limited | Financial Results |
| Tirupati Forge Limited | Financial Results |
| Transport Corporation of India Limited | Financial Results |
| UCO Bank | Financial Results |
| V-Guard Industries Limited | Financial Results |
| Welspun Corp Limited | Financial Results |
| Zydu Wellness Limited | Financial Results |

(Source: NSE)

Corporate Actions as on 28/10/2021

| | |
|-----------------------------|--|
| Asian Paints Limited | Interim Dividend - Rs 3.65 Per Share |
| Bharat Gears Limited | Rights 1:10 @ Premium Rs 95/- |
| IRCTC Limited | Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 2/- Per Share |
| Indo-National Limited | Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 5/- Per Share |
| Sasken Technologies Limited | Interim Dividend - Rs 12 Per Share |
| Trident Limited | Interim Dividend - Rs 0.36 Per Share |

(Source: NSE)

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