

| Indices | Close | Previous | Chg. % |
|------------|--------|----------|--------|
| SENSEX | 53,749 | 54,053 | -0.56% |
| NIFTY | 16,026 | 16,125 | -0.62% |
| NIFTY BANK | 34,340 | 34,290 | 0.14% |
| NIFTY AUTO | 11,012 | 11,116 | -0.94% |
| NIFTY IT | 27,566 | 28,532 | -3.38% |

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|------------|--------|----------|--------|
| DJIA | 32,120 | 31,929 | 0.60% |
| NASDAQ | 11,435 | 11,264 | 1.51% |
| S&P 500 | 3,979 | 3,941 | 0.95% |
| DAX | 14,008 | 13,920 | 0.63% |
| CAC 40 | 6,299 | 6,253 | 0.73% |
| FTSE 100 | 7,523 | 7,484 | 0.51% |
| HANG SENG | 20,171 | 20,112 | 0.29% |
| SSE INDEX | 3,107 | 3,071 | 1.19% |
| NIKKEI 225 | 26,678 | 26,748 | -0.26% |

| Nifty Gainers | Chg. % | Nifty Losers | Chg. % |
|---------------|--------|--------------|--------|
| NTPC | 3.88 | ASIANPAINTS | -8.03 |
| HDFCLIFE | 2.91 | ADANI PORTS | -5.60 |

| Type | 26th May, 2022 | 25th May, 2022 |
|-------------|----------------|----------------|
| Gold | 1852.70 | 1867.50 |
| Brent Crude | 114.32 | 113.56 |

| Type | Current | Previous | Change (bps) |
|-----------------------|---------|----------|--------------|
| G- Sec -6.54% GOI | 7.36 | 7.36 | 0 |
| T-Bill 91 days | 4.88 | 4.87 | 1 |
| CD - 3 MONTHS | 5.10 | 5.12 | -2 |
| CD - 6 MONTHS | 5.70 | 5.73 | -3 |
| AAA Corp Bond - 3 Yr | 7.15 | 7.13 | 2 |
| AAA Corp Bond - 5 Yr | 7.32 | 7.32 | 0 |
| AAA Corp Bond - 10 Yr | 7.68 | 7.70 | -2 |
| 10 Year US Treasury | 2.75 | 2.76 | -1 |

| Rate | |
|---------------------------|-------|
| Repo Rate | 4.40 |
| Cash Reserve Ratio | 4.50 |
| RBI Bank Rate | 4.65 |
| Statutory Liquidity Ratio | 18.00 |
| CPI | 7.79 |

Markets Persist Lower For Third Day

- As investors awaited the release of minutes from Federal Reserve's most recent policy meeting for information on rate hikes, the markets ended lower more than offsetting early gains in trade.
- Once Grasim industries doubled its capex for its paints venture, Asian Paints and Berger Paints Plummeted, with Asian paints dragging Nifty down the greatest.
- IT stocks plunged on release of a forecast portraying slowed growth for IT services demand in FY 2024.

Global & Asian market overview

- **European stocks** Over data showing improvement in German Consumer sentiment, followed by hectic bargain hunting at several counters, European Stocks ended higher the last trading session.
- **US stocks** closed higher as the minutes of the recent Federal Reserve Meeting surprised the investors. The minutes indicated that the central bank intends to take a more neutral stance using both interest rate hikes and reductions in size of its balance sheet to achieve the objective.
- **Asian stocks** rose broadly after U.S Treasury Yields pulled back following weak U.S new home sales data and warning by Snap Inc. The overall mood in the market remained cautious after Beijing tightened its COVID-19 restrictions.

Debt Market Overview

- **SEBI's Four-pronged approach**
 - SEBI, to inject depth into the Debt market with a large number of participants in the Debt Market, is working on a four-step approach lead by setting up of Limited Purpose Clearing Corporation (combined with the efforts of Mutual Fund Industry) to smoothen redemption pressure and settle bond market transactions.
 - The second step will be to allow investors to take up the responsibility of market making.
 - In case of a systematic crisis, the sovereign will step in.
- **US Treasuries** As investors seemed hesitant to make moves ahead of the release of Federal Reserve's Policy Meeting, as a result, treasuries displayed a lackluster performance last trading session. Subsequently, bond prices remained unchanged before closing higher, and the yields fell by 1.1 basis points to 2.749%

Results Today

- Hindalco Industries, Zee Entertainment, Berger Paints, Piramal Enterprises, Qess Corp, Motherson Sumi Systems, Page Industries, Muthoot Finance, NMDC, Motherson Sumi Wiring India, Colgate Palmolive, Bharat Dynamics, Bharat Rasayan, Cummins, INEOS Styrolution India, Insecticides India, India Glycols, Kirloskar Industries

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