



Major Weekly Updates On Your Fingertips

Consumer Goods & Trade

- Passenger vehicle sales growth to **further skid to 7.1% in 2021-22 from earlier projected 8.1%**. Total sales volumes are likely to stand at 3,338,285 units during the year. The revised projections come at a time when the industry is **facing a severe shortage of semiconductor chips** which is likely to impact production and dispatches by manufacturers. Additionally, subdued demand due to increase in vehicle prices and high fuel prices will also impact sales of passenger vehicles.
- The handset industry is at **historically low inventory levels with the latest power crisis in China** adding to the already existing challenges around component shortages and supply chain hurdles, triggering market trackers to lower annual shipment targets further.
- The Union Cabinet **approved the setting up of seven Prime Minister Mega Integrated Textile Region and Apparel (PM MITRA) Parks** with a total outlay of INR 44,450 Mn for five years.
- Cooking oil prices are **expected to rule firm at least until the year-end in view of a shortage in global supplies**, as per a report in Hindu Businessline.
- India's gold imports in Sep'21 **soared 658% from last year's lower base as a correction in local prices to the lowest level** in nearly six months prompted jewellers to step up purchases for the upcoming festive season.

Industrials & Engineering

- Cement companies have **increased the prices of cement by 10-40 rupees** per bag in October across India. This is to primarily pass on rise in input costs like that in pet coke, power, logistics, and freight to customers.
- The aluminium industry and secondary steel producers are **witnessing a sharp drop in their utilisation levels amid increased costs**. This is on account of shortage of coal. While the steel industry relies on thermal coal as a key raw material to produce sponge iron, aluminium smelters have captive power plants that require the fuel as feedstocks.
- India has decided to simplify its **coal stocking regulations for thermal power plants, mandating them to maintain fuel inventories based on a specified plant load factor** to avert the annual crisis the country faces during peak electricity demand seasons.
- Finished steel production in Sep'21 **was higher by 0.4 Mt compared to the production recorded in the corresponding year-ago month**. This represented a 4.7% growth in output to 8.9 MT.

Chemical

- Union Minister **Mansukh Mandaviya** has directed all manufacturers not to increase **retail prices of Di-ammonium Phosphate (DAP) and other phosphatic fertilisers** as part of the government's efforts to ensure the availability of **crop nutrients at affordable prices** during the ongoing Rabi season.

Healthcare & Pharmaceuticals

- The National Medicinal Plant Board (NMPB)** has joined hands with the **Institute of Himalayan Bioresource Technology (IHBT)**, based in **Palampur in Himachal Pradesh**, to promote the production of quality planting material for **medicinal plants**.
- Chennai-based specialty eye care chain Dr Agarwals Eye Hospital** said it is in talks for **Series-D funds**, as it plans to spend **INR 1,000 crore** over the next **three years** to add dozens of hospitals across the country and abroad.
- Apollo Hospitals** said it has launched a **centre of excellence** to provide **world-class critical care facility** to patients through its chain of hospitals and partner institutions using **digital technology**.
- Home healthcare** service provider **HCAH** said it plans to invest around **INR 200-300 crore** in its subsidiary **HCAH SuVitas** to add **1,500 beds in 30 transition care centers** across India over the **next 2-3 years**.
- Max Healthcare Institute** said it plans to invest around **INR 1,600 crore** to expand its capacity in the national capital region by adding around **1,000 beds in Gurugram, Haryana**.
- Piramal Enterprises** said its board has approved a **composite scheme of arrangement providing** for the **demerger** of its **pharmaceuticals business and simplification** of the corporate structure to create two listed entities in financial services and pharmaceuticals.

Energy

- The all-India electricity demand during the period from **April 2021 to September 2021** has increased by **12.7% to 707 billion units (BU)** on a year-on-year basis supported by a lower base, improvement in economic activity and lower than normal monsoons leading to higher demand from the agriculture segment during July and August 2021, according **ratings agency ICRA**.
- Short-term power prices** are likely to remain elevated in the near term on account of a continued increase in **imported coal prices**, according to rating agency **Ind-Ra**.
- Coal dispatch to power stations** have picked up and are likely to increase further to ease the coal stock position, power and renewable energy minister **R K Singh**.
- Maharashtra** may have to resort to power cuts or load shedding as **13 power generating units** supplying electricity to the state have shut down over the past few days due to a countrywide coal shortage.
- The Centre in a statement said the gap between **coal supply and demand** has reduced with **Coal India** dispatches reaching **1.501 million tonnes per day**. The supplies are expected to improve further to **1.6 million tonnes per day** in three days, it said.
- Ministry of Power** issued guidelines for **operationalizing optimum utilisation of generating stations** as per the requirement in the electricity grid. A ministry directive issued and provided guidelines in this regard.
- The government announced guidelines for **cybersecurity in the power sector for the first time**, to create a secure cyber ecosystem. Under the direction of **Union Power and New & Renewable Energy Minister R K Singh, the Central Electricity Authority (CEA)**.

Materials

- The South Indian Cement Manufacturers Association** said it expects **cement production** likely to be badly hit as there has been an unprecedented increase in the **cost of imported coal and 'pet coke'**.

Digital Technology

- The National Association of Software and Services Companies (Nasscom) has set a goal for **the Engineering Research and Development (ER&D) sector** to generate **INR 7513.15 Bn** in revenue by **2030**. With a current market value of INR 2323.07 Bn, the sector will rise to \$63 billion by 2025, representing a 12% annual growth rate. Global ER&D investment is expected to reach INR 90.12 Tn, with corporations spending INR 58001 billion.
- India's top tier **of information technology (IT) services** companies are expected to post revenue growth of **4.1-7%** sequentially and as much as **18.3% on a year-on-year basis** in the second quarter of the current fiscal, on the back of strong demand and steady deal closures.
- India's mobile gaming market** will be **worth INR 525.09 Bn in 2025** from INR 135.24 Bn at present, according to the report titled 'Building up the e-gaming ecosystem of India and the influence of smartphones' by Internet and Mobile Association of India (IAMAI), RedSeer and OnePlus. While casual gaming (Angry Birds, Ludo King) is the most popular genre in India, hardcore games like Battlegrounds Mobile India and Free Fire generate four times as much revenue and user engagement.

Business Services

- RBI Governor Shaktikanta Das announced that the increased limit for the digital payment mode used for making immediate transfer of money will make it convenient for consumers to transfer higher sums. The Reserve Bank of India has increased the limit of IMPS transaction to Rs 5 lakh from Rs 2 lakh earlier for convenience of the consumers.
- The **Reserve Bank of India** on said that it was **reviewing** its recent scheme on **ATM replenishment** whereby the regulator put in place mechanisms to penalise lenders. The central bank deputy governor T Rabi Shankar said that they had received inputs from banks and were in the process of reviewing it.
- Indian life insurance companies are poised to post up to 34% growth in the value of premiums, paced by higher volumes, group insurance coverage and sale of fixed-income linked coverage products. However, margin expansion could be restrained due to a rise in reinsurance rates. Analysts are also monitoring residual Covid-linked claims in the second quarter after a sharp jump in the first quarter that led to a rise in provisions.

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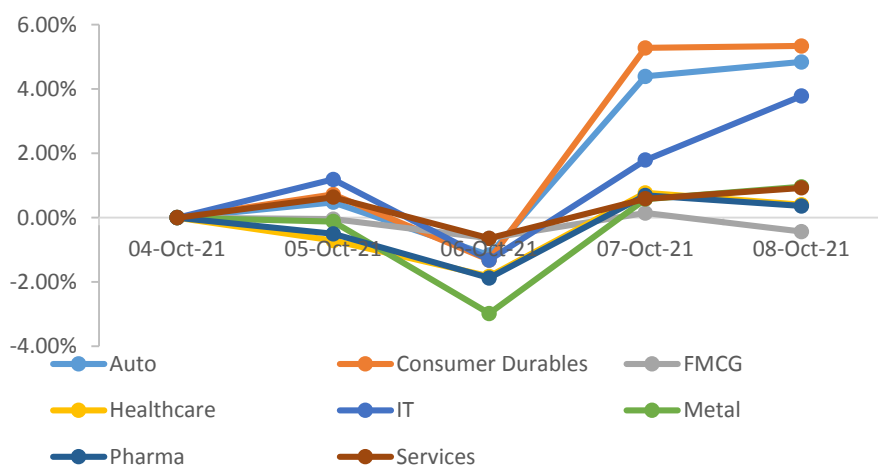


Recent Deals & Transactions in the Sectors Covered

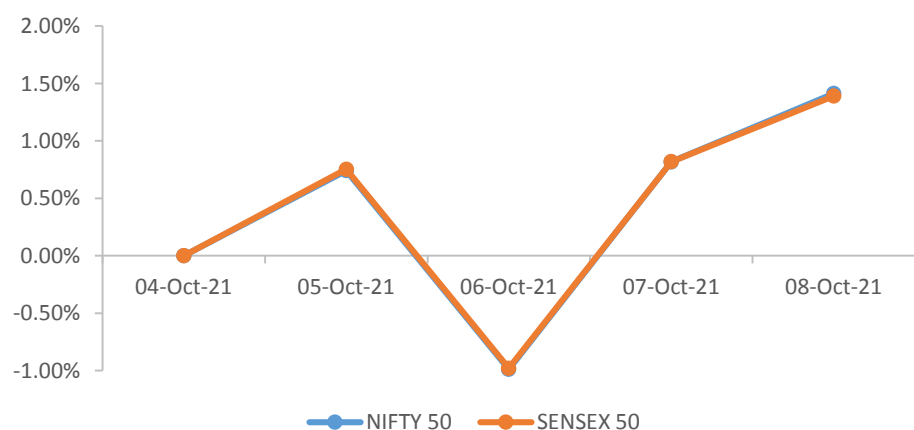
Industry	Date of Transaction	Transaction Type	Buyer/Investor	Seller/Target	Deal Size (In INR MN) /%Stake
Consumer Trade and Goods	04/10/2021	Seed	Venture Catalysts, and others	D'Moksha Homes	43.2/NA
Consumer Trade and Goods	06/10/2021	Seed	LetsVenture, and Others	KWh Bikes	150.2/NA
Consumer Trade and Goods	06/10/2021	Pre-Series A	Pradip Burman, and others	The Woman's Company	105.1/NA
Consumer Trade and Goods	07/10/2021	IPO	-	Gokaldas Exports	3,000/NA
Industrials and Engineering	11/10/2021	Private Equity	ICICI Ventures	EPACK Durable	1,600/NA
Healthcare & Pharmaceutical	04/10/2021	Private Equity	Temasek Holdings Pvt Ltd	Integrace Pvt Ltd	5,400/NA
Digital & Technology	08/10/2021	Series A+	Petronas Ventures	Log9 Materials	150.3/NA
Digital & Technology	06/10/2021	Series A	Stakeboat Capital	Ozonetel communications	375.6/NA
Digital & Technology	05/10/2021	Series C	Lightrock India, Filter Capital	Chalo	3,005.3/NA

Capital Markets Activity

Last Week's Performance of Sectoral Indices



Last Week's Performance of NIFTY 50 and BSE SENSEX



FII & DII Activity (Cash) during Last Week (INR in Mn)

Date	FII			DII		
	Gross Purchase	Gross Sales	Net Purchase /Sales	Gross Purchase	Gross Sales	Net Purchase /Sales
04/10/21	14,121.78	13,261.28	860.50	6,837.52	6,609.46	228.06
05/10/21	8,732.10	10,647.18	-1,915.08	8,711.87	6,843.64	1,868.23
06/10/21	7,357.95	8,160.76	-802.81	5,826.16	6,824.85	-998.69
07/10/21	6,734.60	8,498.85	-1,764.25	7,892.67	5,364.03	2,528.64
08/10/21	6,583.35	6,647.36	-64.01	5,697.83	5,866.02	-168.19

About Week in Review:

Weekly Round Up is a knowledge enhancement and updation Initiative by Pantomath Group focused on the financial services fraternity about the ongoing state of various sectors and respective deals announced and/or closed across Venture Capital, Private Equity, Merger & Acquisitions and Initial Public Offerings. Since the business environment is rapidly changing every day, led by various policy initiatives, investments and acquisitions, the stakeholders in the need to continuously track the happenings taking place in the country to stay ahead. We believe that through this initiative, we could serve the needs of those stakeholders through consolidating all the key weekly highlights in a single publication on a single place.

About Pantomath Group:

Pantomath Group has an impeccable track record of completing equity raising and M&A transactions, supporting ambitious entrepreneurial businesses. Notably, Pantomath Group has completed over 100 transactions in last 5 years. Pantomath Capital Advisors (P) Ltd, is a SEBI-registered investment banker, providing a broad array of financial services. With one of the largest investment banking teams in India, Pantomath management is led by a professionally qualified and versatile think-tank. Drawing on this experience, Pantomath teams assist clients with raising equity capital through IPOs / private equity / strategic investments, mergers & acquisitions, valuations & fairness opinions, buy-backs, public offers and strategic growth advisory. Pantomath has to its credit several prestigious awards and accolades.

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