



01 Feb.2023

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,662	0.0 %	(0.0) %
BSE SENSEX	59,550	0.1 %	0.5 %
CNX BANK	40,655	0.0 %	9.4 %
CNX MIDCAP	30,676	0.0 %	1.8 %
CNX SMALLCAP	9,502	0.0 %	(10.5) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,086	1.1 %	2.9 %
S&P 500	4,077	1.5 %	6.6 %
FTSE 100	7,772	(0.2) %	2.9 %
HANG SENG	21,842	(1.0) %	8.4 %
NIKKEI	27,327	(0.4) %	6.3 %
SHANGHAI COMPOSITE	3,256	(0.4) %	4.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	81.54	0.1 %	(1.4) %
EUR/USD	1.09	(0.3) %	1.6 %
GBP/USD	1.24	(0.1) %	2.4 %
USD/JPY	130.12	0.2 %	(0.8) %
USD/AUD	1.41	0.4 %	(3.7) %
USD/SGD	1.31	0.1 %	(2.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	78	(3.8) %	1.3 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,941	(0.2) %	5.5 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,577	(0.8) %	10.2 %
Copper(USD/MT)	9,227	(1.3) %	10.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.6	0.0 %	(0.3) %

Global Economy: The International Monetary Fund upgraded its global growth outlook for this year as the recent reopening of China is set to safeguard the recovery despite the rise in central bank rates to fight inflation in most advanced economies. The global growth outlook for 2023 was revised up by 0.2 percentage points to 2.9 percent, the IMF said in its World Economic Outlook Update, released Tuesday. Nonetheless, this was weaker than an estimated 3.4 percent growth in 2022. The lender projected economic growth to improve moderately to 3.1 percent next year. Global inflation is forecast to ease to 6.6 percent this year and 4.3 percent in 2024. Still inflation remains above pre-pandemic levels of about 3.5 percent, the lender noted. Euro area narrowly escaped a shrinkage in the fourth quarter, but the growth remained modest on weaker consumer spending amid high inflation. Gross domestic product grew 0.1 percent sequentially after rising 0.3 percent in the third quarter, preliminary flash estimates from Eurostat showed. On a yearly basis, the economy grew at a slower pace of 1.9 percent, following the third quarter's 2.3 percent growth. The manufacturing sector in Japan continued to contract in January, and at a steady pace, the latest survey from Jibun Bank revealed on Wednesday with a manufacturing PMI score of 48.9. That's unchanged from the December reading and remains beneath the boom-or-bust line of 50 that separates expansion from contraction.

Global Indices: The Dow ended with a gain of 368.95 points or 1.09 percent at 34,086.04. The S&P 500 surged 58.83 points or 1.46 percent to 4,076.60, while the Nasdaq climbed 190.74 points or 1.67 percent to 11,584.55.

Indian Economy: Union finance minister Nirmala Sitharaman in the Economic Survey 2023 has projected that India will remain the fastest growing major economy in the world with a GDP growth forecast of 7% in FY23 and 6-6.8% in FY24. India's services sector witnessed a swift rebound in FY22, growing Year-on-Year (YoY) at 8.4% compared to a contraction of 7.8% in the previous financial year. India's current account balance (CAB) recorded a deficit of US\$ 36.4 billion (4.4 per cent of GDP) in Q2FY23 in contrast to a deficit of US\$ 9.7 billion (1.3 per cent of GDP) during the corresponding period of the previous year.

Equity Market: The barometer index, the S&P BSE Sensex rose 49.49 points or 0.08% to 59,549.90. The Nifty 50 index added 13.20 points or 0.07% to 17,662.15.

Corporate News: Coal India posted a consolidated net profit of Rs 7,719.11 crore in Q3 FY23 from Rs 4,556.54 crore recorded in Q3 FY22. Net sales rose to Rs 32,429.46 crore in Q3 FY23 from Rs 25,990.97 crore recorded in Q3 FY22. KPIT Technologies posted a consolidated net profit of Rs 104.05 crore in Q3 FY23 from Rs 83.5 crore recorded in Q2 FY23. Revenue from operations rose to Rs 917.11 crore from Rs 744.83 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(697.2)	(154.5)	(32.4)
MF(INR cr)	(1,654.5)	544.3	627.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	72,087	40,041	50,434
F&O(INR cr)	17,855,959	20,215,208	14,045,042

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.9	20.2	25.2
NSE VIX	16.9	15.0	18.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	40,655	0.7 %	9.4 %	Energy	23,714	1.2 %	(10.4) %
IT	29,740	(1.2) %	(18.2) %	Pharma	12,360	(1.0) %	(9.0) %
Metals	6,468	1.5 %	(0.1) %	Finance	18,095	0.0 %	3.6 %
Auto	13,324	1.9 %	24.8 %	PSU	4,007	4.3 %	41.3 %
FMCG	44,457	0.5 %	21.1 %	Real Estate	412	1.1 %	(13.3) %

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>
Bharat Ele	95	6.7 %	32.4 %	Adani Tota	2,108	(10.0) %	(6.3) %
Bank of Ba	168	5.6 %	44.7 %	Bajaj Fina	5,886	(2.2) %	(20.5) %
Zomato Ltd	50	5.0 %	(41.0) %	TCS	3,359	(2.2) %	(10.6) %
Shree Ceme	23,685	4.9 %	(3.8) %	Mphasis	2,073	(2.1) %	(38.0) %
Indus Towe	153	4.3 %	(30.7) %	Tech Mahin	1,015	(2.0) %	(31.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Commodity Prices y/y	01-02-2023	11:00	AUD	-	0.156
Manufacturing PMI	01-02-2023	20:00	CAD	-	49.2
Manufacturing PMI	01-02-2023	14:00	CHF	-	54.1
Caixin Manufacturing PMI	01-02-2023	07:15	CNY	-	49
Spanish Manufacturing PMI	01-02-2023	13:45	EUR	-	46.4
Italian Manufacturing PMI	01-02-2023	14:15	EUR	-	48.5
French Final Manufacturing PMI	01-02-2023	14:20	EUR	-	50.8
German Final Manufacturing PMI	01-02-2023	14:25	EUR	-	47
Final Manufacturing PMI	01-02-2023	14:30	EUR	-	48.8
CPI Flash Estimate y/y	01-02-2023	15:30	EUR	-	0.092
BRC Shop Price Index y/y	01-02-2023	05:31	GBP	-	0.073
Nationwide HPI m/m	01-02-2023	12:30	GBP	-	(0.001)
Final Manufacturing PMI	01-02-2023	15:00	GBP	-	46.7
Final Manufacturing PMI	01-02-2023	06:00	JPY	-	48.9
Employment Change q/q	01-02-2023	03:15	NZD	-	0.013
ADP Non-Farm Employment Change	01-02-2023	18:45	USD	-	-
Final Manufacturing PMI	01-02-2023	20:15	USD	-	46.8
ISM Manufacturing PMI	01-02-2023	20:30	USD	-	48.4
Crude Oil Inventories	01-02-2023	21:00	USD	-	-

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