



03 Feb.2023

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	17,610	(0.0) %	(0.3) %
BSE SENSEX	59,932	0.4 %	1.1 %
CNX BANK	40,669	0.4 %	9.5 %
CNX MIDCAP	30,433	0.2 %	1.0 %
CNX SMALLCAP	9,448	0.6 %	(11.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	34,054	(0.1) %	2.8 %
S&P 500	4,180	1.5 %	9.3 %
FTSE 100	7,820	0.8 %	3.5 %
HANG SENG	21,958	(0.5) %	9.0 %
NIKKEI	27,402	0.2 %	6.6 %
SHANGHAI COMPOSITE	3,286	0.0 %	5.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	81.69	0.2 %	(1.2) %
EUR/USD	1.08	(0.2) %	1.4 %
GBP/USD	1.23	(0.4) %	2.0 %
USD/JPY	130.22	0.1 %	(0.7) %
USD/AUD	1.42	0.6 %	(3.1) %
USD/SGD	1.32	0.1 %	(2.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	76	(3.1) %	(0.7) %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,968	1.4 %	7.0 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,611	3.1 %	11.7 %
Copper(USD/MT)	9,175	1.1 %	9.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.4	(0.1) %	(0.5) %

Global Economy: After reporting a steep drop in new orders for U.S. manufactured goods in the previous month, the Commerce Department released a report on Thursday showing a notable rebound in factory orders in the month of December. The Commerce Department said factory orders jumped by 1.8 percent in December after plunging by a revised 1.9 percent in November. The Commerce Department also said shipments of manufactured goods slid by 0.7 percent in December following a 0.9 percent decrease in November. With inventories rising and shipments falling, the inventories-to-shipments rate edged up to 1.49 in December from 1.47 in November. A report released by the Labor Department on Thursday showed U.S. labor productivity surged by more than expected in the fourth quarter of 2022. The Labor Department said labor productivity spiked by 3.0 percent in the fourth quarter after jumping by an upwardly revised 1.4 percent in the third quarter. The Bank of England raised its benchmark rate by a half percentage point on Thursday citing stronger-than-expected wage growth but softened its stance on future tightening as inflation is set to return to the target in medium term. The Monetary Policy Committee voted to raise the bank rate by 50 basis points to 4.00 percent, the highest since 2008. Australia's business conditions remained positive in the final quarter of 2022, but sentiment eroded significantly amid concerns about the global and domestic economic growth, survey results from National Australia Bank showed. The NAB business conditions index dropped five points to 18 in the fourth quarter from 23 in the third quarter.

Global Indices: The Dow inched up 6.92 points or less than a tenth of a percent to 34,092.96. The Nasdaq surged 231.77 points or 2.0 percent to 11,816.32, while the S&P 500 jumped 42.61 points or 1.1 percent to 4,119.21.

Indian Economy: Food Corporation of India offered 22.0 LMT out of 25 LMT Wheat stock earmarked for e auction wheat from the Central pool stock to the market through various routes under the Open Market Sale Scheme (Domestic) in the first e auction on 1st February 2023. More than 1100 bidders came forward for participation in the first e auction. A quantity of 8.88 LMT was sold in the first day of e. auction in 22 states.

Equity Market: The barometer index, the S&P BSE Sensex rose 224.16 points or 0.38% to 59,932.24. The Nifty 50 index fell 5.90 points or 0.03% to 17,610.40.

Corporate News: Britannia's consolidated sales for the quarter ended 31st December 2022 grew 16% to Rs 4,101 crore and net profit grew 151% to Rs. 932 crores. The net profit includes an exceptional gain (net of tax) of Rs. 359 crore, pursuant to a joint venture agreement with Bel SA for the Cheese business and consequent sale of 49% equity stake in its subsidiary & fair valuation of the residual stake of 51%. Eicher Motors said that its unlisted subsidiary, VE Commercial Vehicles (VECV) sold 7,181 units of commercial vehicles (CV) in January 2023, registering a growth of 32.1% compared with 5,434 units sold in January 2022.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	310.6	310.6	(33.4)
MF(INR cr)	4,638.1	897.9	660.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	72,066	72,066	50,538
F&O(INR cr)	40,597,151	34,429,167	14,241,043

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.9	17.9	25.1
NSE VIX	15.7	16.3	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	40,669	0.4 %	9.5 %	Energy	22,874	(2.3) %	(13.5) %
IT	30,567	1.8 %	(15.9) %	Pharma	12,306	(0.4) %	(9.4) %
Metals	5,908	(4.4) %	(8.8) %	Finance	18,022	(0.3) %	3.2 %
Auto	13,213	0.0 %	23.8 %	PSU	3,773	(0.2) %	33.1 %
FMCG	45,982	2.3 %	25.2 %	Real Estate	409	0.4 %	(13.8) %

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>
Ambuja Cem	353	5.5 %	15.6 %	Adani Ente	1,565	(26.7) %	(23.4) %
ITC	379	4.8 %	49.5 %	Adani Tran	1,551	(10.0) %	(35.9) %
Britannia	4,573	4.6 %	41.6 %	Adani Tota	1,708	(10.0) %	(24.1) %
LTI Mindtr	4,588	4.5 %	(25.7) %	Adani Gree	1,040	(10.0) %	(46.5) %
One 97	546	4.2 %	(4.5) %	Adani Port	462	(6.6) %	(41.1) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Gov Board Member Maechler Speaks	03-02-2023	14:00	CHF	-	-
Caixin Services PMI	03-02-2023	07:15	CNY	-	48
French Industrial Production m/m	03-02-2023	13:15	EUR	-	0.02
Spanish Services PMI	03-02-2023	13:45	EUR	-	51.6
Italian Services PMI	03-02-2023	14:15	EUR	-	49.9
French Final Services PMI	03-02-2023	14:20	EUR	-	49.2
German Final Services PMI	03-02-2023	14:25	EUR	-	50.4
Final Services PMI	03-02-2023	14:30	EUR	-	50.7
PPI m/m	03-02-2023	15:30	EUR	-	(0.009)
Final Services PMI	03-02-2023	15:00	GBP	-	48
MPC Member Pill Speaks	03-02-2023	17:45	GBP	-	-
Average Hourly Earnings m/m	03-02-2023	19:00	USD	-	0.003
Final Services PMI	03-02-2023	20:15	USD	-	46.6
ISM Services PMI	03-02-2023	20:30	USD	-	49.6

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