



03 Apr.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,453	(0.0) %	(0.0) %
BSE SENSEX	73,904	(0.1) %	(0.1) %
CNX BANK	47,545	(0.1) %	(0.1) %
CNX MIDCAP	49,479	1.2 %	1.2 %
CNX SMALLCAP	15,961	1.2 %	1.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	39,170	(1.0) %	3.9 %
S&P 500	5,206	(0.7) %	9.8 %
FTSE 100	7,935	(0.2) %	2.8 %
HANG SENG	16,932	2.4 %	0.9 %
NIKKEI	39,839	0.1 %	19.7 %
SHANGHAI COMPOSITE	3,075	(0.1) %	3.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.34	(0.1) %	0.4 %
EUR/USD	1.08	(0.1) %	(2.2) %
GBP/USD	1.26	(0.0) %	(0.9) %
USD/JPY	151.38	0.0 %	7.3 %
USD/AUD	1.54	0.1 %	4.5 %
USD/SGD	1.35	0.1 %	2.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	83	0.0 %	18.2 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,253	0.9 %	8.4 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,270	0.0 %	(2.8) %
Copper(USD/MT)	1,965	(77.5) %	(76.7) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.3	0.1 %	0.4 %

Global Economy: The Commerce Department released a report on Tuesday showing a significant rebound in U.S. factory orders in the month of February as factory orders surged by 1.4 percent in February after plunging by a revised 3.8 percent in January. The seasonally adjusted headline Caixin China General Services Business Activity Index rose to 52.7 in March, up from 52.5 in February, to signal an increase in services activity for the fifteenth month in a row. Consumer price inflation in Germany slowed for a third straight month in March to its lowest level in nearly three years but core inflation remained high. The consumer price index rose 2.2 percent year-on-year following a 2.5 percent increase in February, preliminary figures from the statistical office Destatis showed. Core inflation eased slightly to 3.3 percent from 3.4 percent. Inflation, based on the harmonized index of consumer prices or HICP, also slowed for a third month in a row to 2.3 percent from 2.7 percent in February. The euro area manufacturing activity shrunk the most in three months in March despite signs of positive momentum building in output, new orders and business sentiment, a survey compiled by HCOB and S&P Global showed. The final manufacturing Purchasing Managers' Index fell to a three-month low of 46.1 in March from 46.5 in February. At 45.7, the flash reading was even weaker. The service sector in Japan continued to expand in March, and at a faster rate, the latest survey from Jibun Bank revealed on Wednesday with a service PMI score of 54.1.

Global Indices: The Dow tumbled 396.61 points or 1.0 percent to 39,170.24, the Nasdaq slumped 156.38 points or 1.0 percent to 16,240.45 and the S&P 500 slid 37.96 points or 0.7 percent to 5,205.81.

Indian Economy: The seasonally adjusted HSBC India manufacturing purchasing managers' index (PMI) climbed to a 16-year high of 59.1 in March, from 56.9 in February. The notable improvement in operating conditions reflected stronger growth of new orders, output and input stocks as well as renewed job creation.

Equity Market: The broader market outperformed the benchmark indices. The S&P BSE Mid-Cap index added 1.14% and the S&P BSE Small-Cap index gained 1.28%.

Corporate News: UltraTech Cement has commissioned two greenfield capacities: a 2.70 mtpa cement grinding unit at Karur, Tamil Nadu, and a 2.70 mtpa integrated cement plant at Kukurdih, Chhattisgarh. With this, its total domestic grey cement manufacturing capacity increased to 146.2 mtpa, while along with its existing capacity of 5.4 mtpa in the UAE, the company now has a total of 151.6 mtpa. Anupam Rasayan India has signed a letter of intent with a Japanese multinational company worth \$90 million (Rs 743 crore) over the next 7 years to supply two advanced intermediates using fluorination chemistry.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	282.5	223.1	105.7
MF(INR cr)	0.0	0.0	0.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	107,421	56,511	56,511
F&O(INR cr)	39,975,930	30,602,569	30,602,569

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.7	13.7	13.7
NSE VIX	11.7	11.9	11.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	47,545	(0.1) %	(0.1) %	Energy	39,694	0.5 %	0.5 %
IT	34,794	(0.7) %	(0.7) %	Pharma	19,185	(0.1) %	(0.1) %
Metals	8,691	1.5 %	1.5 %	Finance	21,151	(0.2) %	(0.2) %
Auto	21,614	1.1 %	1.1 %	PSU	7,176	0.9 %	0.9 %
FMCG	54,097	0.4 %	0.4 %	Real Estate	949	1.0 %	1.0 %

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>
Adani Powe	588	5.0 %	5.0 %	Hero Motoc	4,561	(2.6) %	(2.6) %
Vedanta	301	4.8 %	4.8 %	Kotak Mah.	1,757	(1.9) %	(1.9) %
Bharat Ele	221	4.7 %	4.7 %	HCL Techno	1,528	(1.8) %	(1.8) %
Hind.Aeron	3,543	4.1 %	4.1 %	Pidilite I	3,000	(1.7) %	(1.7) %
Tata Consu	1,131	4.1 %	4.1 %	ICICI Bank	1,081	(1.7) %	(1.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Caixin Services PMI	03-04-2024	07:15	CNY	-	52.5
French Gov Budget Balance	03-04-2024	12:15	EUR	-	-
Italian Monthly Unemployment Rate	03-04-2024	13:30	EUR	-	0.072
Core CPI Flash Estimate y/y	03-04-2024	14:30	EUR	-	0.031
ADP Non-Farm Employment Change	03-04-2024	17:45	USD	-	-
Final Services PMI	03-04-2024	19:15	USD	-	51.7
ISM Services PMI	03-04-2024	19:30	USD	-	52.6
Crude Oil Inventories	03-04-2024	20:00	USD	-	-
Fed Chair Powell Speaks	03-04-2024	21:40	USD	-	-

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