



03 May.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,648	0.2 %	0.8 %
BSE SENSEX	74,611	0.2 %	0.8 %
CNX BANK	49,231	(0.3) %	3.5 %
CNX MIDCAP	51,115	0.5 %	4.5 %
CNX SMALLCAP	17,019	0.0 %	7.9 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,226	0.9 %	1.4 %
S&P 500	5,064	0.9 %	6.8 %
FTSE 100	8,172	0.6 %	5.8 %
HANG SENG	18,207	2.5 %	8.4 %
NIKKEI	38,236	(0.1) %	14.9 %
SHANGHAI COMPOSITE	3,105	(0.3) %	4.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.44	0.0 %	0.5 %
EUR/USD	1.07	0.2 %	(2.9) %
GBP/USD	1.25	0.4 %	(1.5) %
USD/JPY	156.69	(1.1) %	11.1 %
USD/AUD	1.52	(0.5) %	3.7 %
USD/SGD	1.36	(0.2) %	3.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	79	(4.5) %	12.2 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,318	(0.5) %	11.5 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,555	0.4 %	9.3 %
Copper(USD/MT)	9,791	(1.8) %	16.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.6	0.0 %	0.8 %

Global Economy: The U.S. trade deficit edged slightly lower in the month of March, according to a report released by the Commerce Department on Thursday. The Commerce Department said the trade deficit narrowed to \$69.4 billion in March from a revised \$69.5 billion in February. The report said the value of imports slumped by 1.6 percent to \$327.0 billion in March after surging by 2.3 percent to \$332.4 billion in February. The value of exports also tumbled by 2.0 percent to \$257.6 billion in March after jumping by 2.2 percent to \$262.9 billion in February. New orders for U.S. manufactured goods surged in line with economist estimates in the month of March, according to a report released by the Commerce Department on Thursday. The Commerce Department said factory orders shot up by 1.6 percent in March after jumping by a downwardly revised 1.2 percent in February. Confidence among companies in Germany's automotive industry improved in April though they remained concerned about a lack of orders, a survey by the ifo institute showed. The business climate for Germany's automotive industry rose to -1.5 points from -5.3 points in March, the think tank said. The services sector in Australia continued to expand in April, albeit at a slower rate, the latest survey from Judo Bank revealed on Friday with a services PMI score of 53.6. That's down from 54.4 in March, although it remains above the boom-or-bust line of 50 that separates expansion from contraction.

Global Indices: The Dow jumped 322.37 points or 0.9 percent to 38,225.66, the Nasdaq surged 235.48 points or 1.5 percent to 15,840.96 and the S&P 500 advanced 45.81 points or 0.9 percent at 5,064.20.

Indian Economy: Despite falling from 59.1 in March to 58.8 in April, the seasonally adjusted HSBC India Manufacturing Purchasing Managers' Index (PMI) signaled the second-best improvement in the health of the sector for three-and-a-half years. The PMI was comfortably above both the neutral mark of 50.0 and its long-run average (53.9). The Indian manufacturing sector started the first fiscal quarter in a high gear, according to the latest HSBC PMI data. Firms experienced a sharp upturn in new business intakes, and scaled up production accordingly.

Equity Market: The barometer index, the S&P BSE Sensex rose 128.33 points or 0.17% to 74,611.11. The Nifty 50 index added 43.35 points or 0.19% to 22,648.20.

Corporate News: Coforge recorded a consolidated net profit of Rs 229.2 crore for the March FY24 quarter, falling 5.6 percent compared to the previous quarter, impacted by weak operating numbers. Revenue from operations grew by 1.5 percent sequentially to Rs 2,358.5 crore for the quarter. Coal India has recorded consolidated net profit at Rs 8,640.5 crore for the quarter ended March FY24, rising sharply by 25.8 percent over a year-ago period despite weak topline, aided by strong operating numbers with a fall in input costs and employee expenses.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	221.6	(61.0)	(61.0)
MF(INR cr)	1,382.3	1,631.3	1,631.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	133,768	133,768	104,256
F&O(INR cr)	68,569,792	36,050,534	36,050,534

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.4	15.4	16.1
NSE VIX	13.5	13.5	11.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	49,231	(0.3) %	3.5 %	Energy	40,801	1.1 %	3.3 %
IT	33,203	0.0 %	(5.2) %	Pharma	19,124	0.8 %	(0.4) %
Metals	9,280	1.1 %	8.4 %	Finance	21,874	0.1 %	3.2 %
Auto	22,734	1.1 %	6.3 %	PSU	7,586	(0.3) %	6.6 %
FMCG	54,491	0.5 %	1.1 %	Real Estate	973	(0.1) %	3.5 %

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>
REC Ltd	554	9.2 %	20.3 %	Kotak Mah.	1,576	(3.0) %	(12.0) %
Cholaman.I	1,302	9.1 %	9.8 %	Punjab Nat	138	(2.1) %	9.9 %
Power Fin.	468	6.0 %	16.6 %	Pidilite I	2,988	(2.0) %	(2.1) %
Trent	4,647	5.4 %	19.6 %	GAIL (Indi	205	(1.9) %	12.4 %
B P C L	635	4.5 %	5.7 %	Tata Consu	1,091	(1.6) %	0.4 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
French Gov Budget Balance	03-05-2024	12:15	EUR	-	-
Spanish Unemployment Change	03-05-2024	12:30	EUR	-	-
Italian Monthly Unemployment Rate	03-05-2024	13:30	EUR	-	0.075
Unemployment Rate	03-05-2024	14:30	EUR	-	0.065
Final Services PMI	03-05-2024	14:00	GBP	-	54.9
Average Hourly Earnings m/m	03-05-2024	18:00	USD	-	0.003
Final Services PMI	03-05-2024	19:15	USD	-	50.9
ISM Services PMI	03-05-2024	19:30	USD	-	51.4

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