



03 Jun.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,531	0.2 %	0.3 %
BSE SENSEX	73,961	0.1 %	(0.1) %
CNX BANK	48,984	0.6 %	3.0 %
CNX MIDCAP	51,706	0.5 %	5.7 %
CNX SMALLCAP	16,697	0.5 %	5.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,686	1.5 %	2.6 %
S&P 500	5,278	0.8 %	11.3 %
FTSE 100	8,275	44.3 %	7.2 %
HANG SENG	18,080	(0.8) %	7.7 %
NIKKEI	38,488	1.1 %	15.6 %
SHANGHAI COMPOSITE	3,087	(0.2) %	4.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.33	0.0 %	0.4 %
EUR/USD	1.08	(0.1) %	(2.0) %
GBP/USD	1.27	(0.1) %	(0.1) %
USD/JPY	156.94	(0.3) %	11.2 %
USD/AUD	1.51	0.2 %	2.8 %
USD/SGD	1.35	0.1 %	2.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	77	(2.8) %	9.4 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,327	(0.5) %	12.0 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,677	0.4 %	14.6 %
Copper(USD/MT)	9,985	(0.3) %	18.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.5	(0.0) %	0.6 %

Global Economy: The U.S. Commerce Department released a report that showed its personal consumption expenditures (PCE) price index rose by 0.3 percent for the third straight month in April. Meanwhile, the report said the core PCE price index crept up by 0.2 percent in April after rising by 0.3 percent in March. The report said personal income rose by 0.3 percent in April after climbing by 0.5 percent in March. The Commerce Department also said personal spending inched up by 0.2 percent in April after advancing by 0.7 percent in March. The manufacturing sector in China continued to expand in May, and at a faster pace, the latest survey from Caixin revealed on Monday with a manufacturing PMI score of 51.7. That's up from 51.4 in April, and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. Eurozone headline and core inflation accelerated in May largely driven by higher services costs. The harmonized index of consumer prices posted a faster-than-expected increase of 2.6 percent, following the 2.4 percent rise in April, flash data from Eurostat showed. Annual inflation was seen at 2.5 percent. Core inflation accelerated unexpectedly to 2.9 percent. On a calendar and seasonally adjusted basis, retail sales in Germany slumped 1.2 percent from March, when they grew an upwardly revised 2.6 percent, preliminary data from the statistical office Destatis showed. On a year-on-year basis, retail sales fell 0.6 percent in April.

Global Indices: For the week, the S&P 500 fell by 0.5 percent and the Dow and the Nasdaq slumped by 1.0 percent and 1.1 percent, respectively, although the major averages all posted strong gains for the month of May.

Indian Economy: India's gross domestic product (GDP) rose by 7.8% on year in March quarter of the FY24. For the whole FY24, the economy clocked a growth rate of 8.2%, according to official data. The real Gross Value Added (GVA) also rose by 7.2% in FY24 compared to 6.7% in FY23, riding on better performance by manufacturing sector. The combined Index of Eight Core Industries (ICI) increased by 6.2 per cent (provisional) in April, 2024 as compared to the Index in April, 2023.

Equity Market: The barometer index, the S&P BSE Sensex, was up 75.71 points or 0.10% to 73,961.31. The Nifty 50 index added 42.05 points or 0.19% to 22,530.70.

Corporate News: Coal India reported a 7.5 per cent increase in coal production for May, reaching 64.4 million tonnes year-on-year. Additionally, coal offtake rose by 7.2 per cent to 68.2 million tonnes. Ashoka Buildcon has emerged as the lowest bidder for two projects worth Rs 2,153 crore from the Maharashtra State Road Development Corporation.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(134.5)	(172.9)	(118.4)
MF(INR cr)	5,525.0	2,258.3	1,949.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	238,465	119,888	117,318
F&O(INR cr)	5,412,796	35,128,595	35,567,614

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.9	13.1	14.6
NSE VIX	24.6	20.2	16.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	48,984	0.6 %	3.0 %	Energy	40,256	0.7 %	1.9 %
IT	32,386	(1.3) %	(7.6) %	Pharma	18,796	(0.9) %	(2.1) %
Metals	9,724	1.9 %	13.6 %	Finance	21,718	0.6 %	2.5 %
Auto	23,420	(0.2) %	9.5 %	PSU	7,386	1.3 %	3.8 %
FMCG	54,107	(0.3) %	0.4 %	Real Estate	1,019	2.3 %	8.5 %

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>
Adani Tota	1,039	8.8 %	7.2 %	Berger Pai	460	(3.7) %	(18.8) %
Adani Powe	756	8.2 %	34.9 %	Avenue Sup	4,302	(3.2) %	(4.0) %
Adani Ente	3,411	6.8 %	4.9 %	Divi's Lab	4,307	(2.4) %	20.7 %
Adani Port	1,437	3.9 %	4.5 %	Zydus Life	1,000	(2.3) %	0.0 %
Tata Power	437	2.7 %	7.3 %	TVS Motor	2,179	(2.3) %	1.9 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
MI Inflation Gauge m/m	03-06-2024	06:30	AUD	-	0.001
ANZ Job Advertisements m/m	03-06-2024	07:00	AUD	-	0.028
Commodity Prices y/y	03-06-2024	12:00	AUD	-	(0.116)
Manufacturing PMI	03-06-2024	19:00	CAD	-	49.4
Manufacturing PMI	03-06-2024	13:00	CHF	-	41.4
Caixin Manufacturing PMI	03-06-2024	07:15	CNY	-	51.4
Spanish Manufacturing PMI	03-06-2024	12:45	EUR	-	52.2
Italian Manufacturing PMI	03-06-2024	13:15	EUR	-	47.3
French Final Manufacturing PMI	03-06-2024	13:20	EUR	-	46.7
German Final Manufacturing PMI	03-06-2024	13:25	EUR	-	45.4
Final Manufacturing PMI	03-06-2024	13:30	EUR	-	47.4
Final Manufacturing PMI	03-06-2024	14:00	GBP	-	51.3
Capital Spending q/y	03-06-2024	05:20	JPY	-	0.164
Final Manufacturing PMI	03-06-2024	06:00	JPY	-	50.5
Final Manufacturing PMI	03-06-2024	19:15	USD	-	50.9
ISM Manufacturing PMI	03-06-2024	19:30	USD	-	49.2

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