



04 Jun.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	23,264	3.3 %	3.6 %
BSE SENSEX	76,469	3.4 %	3.3 %
CNX BANK	50,980	4.1 %	7.1 %
CNX MIDCAP	53,353	3.2 %	9.1 %
CNX SMALLCAP	17,099	2.4 %	8.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,571	(0.3) %	2.3 %
S&P 500	5,283	0.1 %	11.4 %
FTSE 100	8,263	(0.2) %	7.0 %
HANG SENG	18,403	1.8 %	9.6 %
NIKKEI	38,923	1.1 %	16.9 %
SHANGHAI COMPOSITE	3,078	(0.3) %	3.9 %

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: New orders returned to growth in the US manufacturing sector in May, supporting a faster expansion in production midway through the second quarter of the year. Meanwhile, business confidence picked up and positive expectations regarding the future for the sector contributed to the hiring of additional staff, a renewed rise in purchasing activity and a build-up of stocks of finished goods. The seasonally adjusted S&P Global US Manufacturing Purchasing Managers' Index (PMI) rose to 51.3 in May, after having posted in line with the 50.0 no-change mark in April. The reading signaled a modest improvement in the health of the manufacturing sector, the fourth in the past five months. Downturn in the euro area manufacturing activity softened in May as production moved closer to stabilization and orders fell at a slower pace amid the rising business sentiment, final HCOB survey results from S&P Global showed on Monday. The manufacturing Purchasing Managers' Index rose to 47.3 in May from 45.7 in April. The UK manufacturing sector returned to growth in May as production grew the most in more than two years on improved order intakes, final survey data released by S&P Global revealed. The manufacturing Purchasing Managers' Index advanced to 51.2 in May from 49.1 in April. The monetary base in Japan was up 0.9 percent on year in May, the Bank of Japan said on Tuesday - coming in at 678.824 trillion yen. That's down sharply from the 2.1 percent increase in April.

Global Indices: The Nasdaq outperformed, settling at 16,828.67 with a gain of 93.65 points or 0.56 percent. The S&P 500 edged up 5.89 points or 0.11 percent to finish at 5,283.40, while the Dow ended down 115.29 points or 0.3 percent at 38,571.03.

Indian Economy: India's manufacturing sector growth softened to a three-month low in May. The HSBC final India Manufacturing Purchasing Managers' Index, compiled by S&P Global, dipped to 57.5 in May from April's 58.8, below a preliminary estimate of 58.4. However, the index remained above its long-run average and has been above the 50-mark separating contraction from expansion for almost three years.

Equity Market: Domestic stocks soared on exit poll euphoria! Buoyed by exit poll predictions of a strong BJP win, investors piled into Indian stocks, sending the Nifty50 above 23,250.

Corporate News: Mahindra & Mahindra Financial Services reported a 7% year-on-year increase in overall disbursements, which amounted to ₹4,430 crore. Business assets of the company stood at approximately ₹1,05,250 crore in the month, growing by 23% Y-o-Y in May. Welspun Corp announced that its associate entity EPIC has signed multiple agreements worth SAR 1.65 billion (about ₹3,670 crore) with Saudi Arabian Oil Co. (Aramco) for the supply of steel pipes.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	261.4	(151.1)	(108.4)
MF(INR cr)	(258.3)	2,138.5	1,895.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	186,160	186,160	118,919
F&O(INR cr)	19,106,881	19,106,881	35,184,806

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.9	13.1	14.6
NSE VIX	20.9	20.9	16.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	50,980	4.1 %	7.1 %	Energy	42,982	6.8 %	8.8 %
IT	32,511	0.4 %	(7.2) %	Pharma	18,864	0.4 %	(1.8) %
Metals	10,049	3.3 %	17.4 %	Finance	22,596	4.0 %	6.6 %
Auto	23,993	2.4 %	12.2 %	PSU	8,006	8.4 %	12.6 %
FMCG	54,654	1.0 %	1.4 %	Real Estate	1,080	5.9 %	14.9 %

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	875	15.7 %	56.0 %	Zomato Ltd	175	(2.1) %	(4.9) %
GAIL (Indi	231	13.0 %	26.6 %	Havells In	1,879	(1.5) %	24.1 %
Power Fin.	555	12.7 %	38.3 %	Bosch	29,989	(1.3) %	(1.0) %
REC Ltd	605	12.4 %	31.3 %	Eicher Mot	4,671	(1.3) %	18.3 %
Bank of Ba	297	12.1 %	11.3 %	Samvardh.	149	(1.2) %	24.4 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Company Operating Profits q/q	04-06-2024	07:00	AUD	-	0.074
CPI m/m	04-06-2024	12:00	CHF	-	0.003
French Gov Budget Balance	04-06-2024	12:15	EUR	-	-
Spanish Unemployment Change	04-06-2024	12:30	EUR	-	-
German Unemployment Change	04-06-2024	13:25	EUR	-	-
BRC Retail Sales Monitor y/y	04-06-2024	04:31	GBP	-	(0.044)
Monetary Base y/y	04-06-2024	05:20	JPY	-	0.021
10-y Bond Auction	04-06-2024	09:05	JPY	-	-
JOLTS Job Openings	04-06-2024	19:30	USD	-	-

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