



05 Apr.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,515	0.4 %	0.2 %
BSE SENSEX	74,228	0.5 %	0.3 %
CNX BANK	48,061	0.9 %	1.0 %
CNX MIDCAP	49,744	0.0 %	1.7 %
CNX SMALLCAP	16,219	0.5 %	2.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,597	(1.4) %	2.3 %
S&P 500	5,147	(1.2) %	8.5 %
FTSE 100	7,976	0.5 %	3.3 %
HANG SENG	16,725	(1.2) %	(0.4) %
NIKKEI	39,773	0.8 %	19.5 %
SHANGHAI COMPOSITE	3,069	(0.2) %	3.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.37	(0.0) %	0.4 %
EUR/USD	1.07	(0.2) %	(2.6) %
GBP/USD	1.26	(0.3) %	(1.3) %
USD/JPY	151.65	0.1 %	7.5 %
USD/AUD	1.54	0.1 %	4.6 %
USD/SGD	1.35	0.1 %	2.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	85	2.4 %	21.0 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,300	0.7 %	10.6 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,334	0.5 %	(0.1) %
Copper(USD/MT)	8,932	0.1 %	6.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.4	0.0 %	0.5 %

Global Economy: A report released by the Commerce Department on Thursday showed the U.S. trade deficit unexpectedly widened in the month of February. The Commerce Department said the trade deficit increased to \$68.9 billion in February from a revised \$67.6 billion in January. The wider trade deficit in February matched the largest gap between imports and exports since the deficit reached \$72.2 billion last April. The total value of imports surged by 2.2 percent to \$331.9 billion in February. Meanwhile, the value of exports shot up by 2.3 percent to a record high of \$263.0 billion in February. The euro area private sector expanded in March, halting a sequence of contraction that started last June, final survey results of the purchasing managers' survey by S&P Global showed on Thursday. The final HCOB composite output index rose to a ten-month high of 50.3 in March from 49.2 in February. At 49.9, the flash reading had signaled another month of decline in activity. Eurozone producer prices logged a further steep decline in February amid a continued downward trend in energy prices, data published by Eurostat showed on Thursday. Producer prices fell 8.3 percent year-over-year in February, slightly faster than the revised 8.0 percent decrease in January. Australia posted a seasonally adjusted merchandise trade surplus of A\$7.280 billion in February, the Australian Bureau of Statistics said on Friday.

Global Indices: The Nasdaq tumbled 228.38 points or 1.4 percent to 16,049.08, while the S&P 500 slumped 64.28 points or 1.2 percent to 5,147.21.

Indian Economy: India's service sector saw a strong surge in March, according to the HSBC India Services PMI. The index jumped to 61.2, indicating one of the fastest growth rates in over 13 years. This positive trend is attributed to factors like healthy demand, improved efficiency, and strong sales. The HSBC India Composite PMI Output Index increased to 61.8 in March from 60.6 in February, highlighting the second-strongest upturn in over 13-and-a-half years (behind July 2023).

Equity Market: The S&P BSE Sensex gained 350.81 points or 0.47% to 74,227.63. The Nifty 50 index added 80 points or 0.36% to 22,514.65.

Corporate News: Bajaj Finance's assets under management (AUM) grew by 34 percent to Rs 3.3 lakh crore in the year ended March FY24, and the same in Q4 FY24 increased by Rs 19,400 crore. The deposit book in FY24 at Rs 60,100 crore grew by 35 percent compared to the previous fiscal. New loans booked during Q4 FY24 rose 4 percent to 7.87 million, while customer franchises during the quarter increased by 3.23 million. Cello World's subsidiary Cello Consumerware has commissioned its manufacturing facility in a phased manner in Rajasthan. Further, the glassware furnace coming up in the same facility will be operational by the end of Q1 FY25.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(150.4)	(102.0)	(102.0)
MF(INR cr)	499.0	499.0	499.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	6,942	58,714	58,714
F&O(INR cr)	56,322,974	43,287,811	43,287,811

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.3	14.2	14.2
NSE VIX	11.2	11.6	11.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	48,061	0.9 %	1.0 %	Energy	39,530	(0.4) %	0.1 %
IT	35,427	1.1 %	1.1 %	Pharma	19,125	(0.1) %	(0.4) %
Metals	8,684	(0.1) %	1.4 %	Finance	21,374	0.8 %	0.8 %
Auto	21,652	0.4 %	1.2 %	PSU	7,253	(0.7) %	2.0 %
FMCG	53,634	(0.4) %	(0.5) %	Real Estate	925	(0.0) %	(1.6) %

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>
Zomato Ltd	187	4.9 %	1.4 %	Dabur Indi	506	(4.7) %	(4.4) %
Avenue Sup	4,645	4.1 %	3.6 %	Colgate-Pa	2,707	(3.3) %	(0.3) %
Adani Powe	642	3.9 %	14.6 %	ICICI Lomb	1,638	(3.2) %	(3.5) %
Vedanta	310	3.7 %	7.8 %	Bajaj Hold	8,125	(2.8) %	(3.4) %
HDFC Bank	1,528	3.1 %	3.9 %	ICICI Pru	606	(2.4) %	(1.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Goods Trade Balance	05-04-2024	06:00	AUD	-	-
Employment Change	05-04-2024	18:00	CAD	-	-
Ivey PMI	05-04-2024	19:30	CAD	-	53.9
Foreign Currency Reserves	05-04-2024	12:30	CHF	-	-
SECO Consumer Climate	05-04-2024	13:30	CHF	-	(42)
German Factory Orders m/m	05-04-2024	11:30	EUR	-	(0.113)
French Industrial Production m/m	05-04-2024	12:15	EUR	-	(0.011)
Retail Sales m/m	05-04-2024	14:30	EUR	-	0.001
Construction PMI	05-04-2024	14:00	GBP	-	49.7
Household Spending y/y	05-04-2024	05:00	JPY	-	(0.063)
Leading Indicators	05-04-2024	10:30	JPY	-	1.095
FOMC Member Barkin Speaks	05-04-2024	18:45	USD	-	-

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