



05 Jun.2024

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	21,885	(5.9) %	(2.6) %
BSE SENSEX	72,079	(5.7) %	(2.6) %
CNX BANK	46,929	(7.9) %	(1.4) %
CNX MIDCAP	49,151	(7.9) %	0.5 %
CNX SMALLCAP	15,692	(8.2) %	(0.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,711	0.4 %	2.6 %
S&P 500	5,291	0.2 %	11.6 %
FTSE 100	8,232	(0.4) %	6.6 %
HANG SENG	18,444	0.2 %	9.9 %
NIKKEI	38,837	(0.2) %	16.7 %
SHANGHAI COMPOSITE	3,078	(0.3) %	3.9 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	83.43	0.1 %	0.5 %
EUR/USD	1.08	0.3 %	(1.7) %
GBP/USD	1.27	0.2 %	0.1 %
USD/JPY	157.32	0.2 %	11.5 %
USD/AUD	1.50	(0.5) %	2.3 %
USD/SGD	1.35	0.0 %	2.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	(3.6) %	5.5 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,345	0.8 %	12.8 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,625	(1.9) %	12.3 %
Copper(USD/MT)	9,986	0.0 %	18.5 %

**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	(0.1) %	0.5 %

**Global Economy:** A report released by the Commerce Department on Tuesday showed new orders for U.S. manufactured goods rose by slightly more than expected in the month of April. The Commerce Department said factory orders climbed by 0.7 percent in April compared to economist estimates for an increase of 0.6 percent. However, the report also showed the jump in factory orders in March was downwardly revised to 0.7 percent from the previously reported 1.6 percent. The services sector in China continued to expand in May, and at a faster pace, the latest survey from Caixin revealed on Wednesday with a services PMI core of 54.0. That's up from 52.5 in April and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. Underpinning the latest acceleration in services activity growth was faster new business inflows. Incoming new work increased at the quickest pace since May 2023 and solid overall. Likewise for export business, the rate of expansion was the most pronounced in a year. Germany's unemployment increased more than expected in May as the economic recovery was not sufficient to bring a marked improvement in the labor market. The unemployment rate held steady for the sixth successive month, at an adjusted 5.9 percent in May. Australia's gross domestic product expanded a seasonally adjusted 0.1 percent on quarter in the first quarter of 2024, the Australian Bureau of Statistics said on Wednesday. On an annualized basis, GDP grew 1.1 percent.

**Global Indices:** The Dow climbed 140.26 points or 0.4 percent to 38,711.29, the Nasdaq rose 28.38 points or 0.2 percent to 16,857.05 and the S&P 500 edged up 7.94 points or 0.2 percent to 5,291.34.

**Indian Economy:** After a long-drawn process, the election results for all the 543 seats have been announced by the Election Commission of India. With the Bharatiya Janata Party (BJP) falling short of the majority number that would have given it sole majority in the Lok Sabha, the party will have to rely on its allies to form the next government. As per the latest tally, BJP-led NDA government is leading on 291 seats, while INDIA block is leading on 234 seats.

**Equity Market:** The domestic equity market crashed, as both the Nifty and the Sensex experienced their sharpest single-day decline since March 2020. The barometer index, the S&P BSE Sensex tumbled 4,389.73 points or 5.74% to 72,079.05. The Nifty 50 index tanked 1,379.40 points or 5.93% to 21,884.50.

**Corporate News:** Container Corporation of India (CONCOR) signed a MoU with Shipping Corporation of India (SCI) to explore business opportunities for leveraging the advantage of each other's infrastructure and experience in synergy to offer seamless and cost-effective end-to-end logistics services to customers under a single window. Tata Motors board approved to set up a wholly-owned subsidiary for commercial vehicles business. The company proposed the name of the new unit as TML Commercial Vehicles. The firm will be a wholly-owned subsidiary of the company, said Tata Motors in a regulatory filing.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	824.3	824.3	(84.5)
MF(INR cr)	1,372.0	1,372.0	1,903.8

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	21,722	103,941	116,710
F&O(INR cr)	41,539,539	30,323,210	35,329,232

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.1	13.1	14.6
NSE VIX	26.8	23.8	16.5

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	46,929	(7.9) %	(1.4) %	Energy	37,624	(12.5) %	(4.7) %
IT	32,316	(0.6) %	(7.8) %	Pharma	18,603	(1.4) %	(3.1) %
Metals	8,980	(10.6) %	4.9 %	Finance	20,820	(7.9) %	(1.8) %
Auto	23,193	(3.3) %	8.5 %	PSU	6,794	(15.1) %	(4.5) %
FMCG	55,173	0.9 %	2.4 %	Real Estate	976	(9.6) %	3.9 %

## 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>
Dabur Indi	578	6.1 %	9.3 %	REC Ltd	452	(25.2) %	(1.8) %
Hind. Unil	2,496	6.0 %	9.2 %	Power Fin.	427	(23.1) %	6.4 %
Avenue Sup	4,549	4.6 %	1.5 %	Adani Port	1,249	(21.1) %	(9.2) %
Colgate-Pa	2,810	4.6 %	3.4 %	Adani Ener	978	(20.0) %	(12.1) %
Marico	615	3.4 %	24.0 %	Bharat Ele	256	(19.8) %	21.1 %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
GDP q/q	05-06-2024	07:00	AUD	-	0.002
Labor Productivity q/q	05-06-2024	18:00	CAD	-	0.004
BOC Rate Statement	05-06-2024	19:15	CAD	-	-
BOC Press Conference	05-06-2024	20:00	CAD	-	-
Caixin Services PMI	05-06-2024	07:15	CNY	-	52.5
French Industrial Production m/m	05-06-2024	12:15	EUR	-	-
Spanish Services PMI	05-06-2024	12:45	EUR	-	56.2
Italian Services PMI	05-06-2024	13:15	EUR	-	54.3
French Final Services PMI	05-06-2024	13:20	EUR	-	49.4
German Final Services PMI	05-06-2024	13:25	EUR	-	53.9
Final Services PMI	05-06-2024	13:30	EUR	-	53.3
PPI m/m	05-06-2024	14:30	EUR	-	(0.004)
Final Services PMI	05-06-2024	14:00	GBP	-	52.9
Average Cash Earnings y/y	05-06-2024	05:00	JPY	-	0.01
Overseas Trade Index q/q	05-06-2024	04:15	NZD	-	(0.078)
ADP Non-Farm Employment Change	05-06-2024	17:45	USD	-	-
ISM Services PMI	05-06-2024	19:30	USD	-	49.4

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