



06 Jun.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,620	3.4 %	0.7 %
BSE SENSEX	74,382	3.2 %	0.5 %
CNX BANK	49,055	4.5 %	3.1 %
CNX MIDCAP	51,267	4.3 %	4.8 %
CNX SMALLCAP	16,289	3.8 %	3.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,807	0.3 %	2.9 %
S&P 500	5,354	1.2 %	12.9 %
FTSE 100	8,247	0.2 %	6.8 %
HANG SENG	18,425	(0.1) %	9.7 %
NIKKEI	38,490	(0.9) %	15.6 %
SHANGHAI COMPOSITE	3,065	(0.8) %	3.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.12	(0.4) %	0.1 %
EUR/USD	1.09	0.2 %	(1.5) %
GBP/USD	1.28	0.1 %	0.2 %
USD/JPY	156.72	(0.4) %	11.1 %
USD/AUD	1.50	(0.2) %	2.1 %
USD/SGD	1.35	(0.2) %	2.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	(1.3) %	4.1 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,335	(0.4) %	12.4 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,603	(0.8) %	11.4 %
Copper(USD/MT)	9,859	(1.3) %	16.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.3	(0.1) %	0.5 %

Global Economy: U.S. private sector activity rose at the fastest pace in over two years in May led by strong gains in output and new orders across both the manufacturing and services sectors, the purchasing managers' survey findings from S&P Global showed Wednesday. The S&P Global final US Composite PMI, which combines manufacturing and services, rose to 54.5 from 51.3 in April. A renewed increase in new orders led the S&P Global final US Services PMI to a one-year high of 54.8 in May from 51.3 in April. Eurozone private sector posted the fastest growth in a year in May as strong demand boosted production and hiring amid cooling inflation, the final Purchasing Managers' survey data compiled by S&P Global showed. The HCOB composite output index posted 52.2 in May, up from 51.7 in the previous month. The services PMI came in at 53.2 in May, which was broadly unchanged from April's 11-month high of 53.3. Germany's private sector growth gathered momentum in May with the pace of expansion reaching one-year high, survey data showed. The final HCOB composite output index rose to 52.4 from 50.6 in April. The flash score was 52.2. The services PMI posted a 12-month high of 54.2 in May, up from 53.2 in April. Japan's total labor cash earnings continued to increase in April, and at the quickest pace in ten months, a report from the Ministry of Health, Labor, and Welfare showed. Total earnings rose 2.1 percent year-over-year in April, faster than the revised 1.0 percent growth in March.

Global Indices: The Nasdaq surged 330.86 points or 2.0 percent to 17,187.90 and the S&P 500 jumped 62.69 points or 1.2 percent to 5,354.03, while the narrower Dow posted a more modest gain, rising 96.04 points or 0.3 percent to 38,807.33.

Indian Economy: The seasonally adjusted HSBC India Services Business Activity Index remained comfortably above the neutral mark of 50.0 in May, highlighting a sharp upturn in output. That said, the headline figure fell from 60.8 in April to 60.2, its lowest mark since last December. The HSBC India Composite Output Index slipped from 61.5 in April to 60.5 in May, highlighting the slowest rate of expansion since last December. There were softer increases in both factory production and services activity.

Equity Market: In the barometer index, the barometer index, the S&P BSE Sensex was soared 2,303.19 points or 3.20% to 74,382.24. The Nifty 50 index surged 735.85 points or 3.36% to 22,620.35.

Corporate News: Indian Energy Exchange (IEX) disclosed a significant surge in its monthly volume, reaching 10,633 MU, marking a 29 per cent year-on-year increase. Moreover, Renewable Energy Certificate volumes soared by an impressive 640 per cent Y-o-Y, while the Green market witnessed a robust growth of 74 per cent Y-o-Y. Force Motors total domestic sales rose 13.9 per cent at 2,412 units in May versus 2,118 units (Y-o-Y). While total exports down 63.3 per cent at 180 units as against 491 units (Y-o-Y).



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(1,466.3)	(321.0)	(119.1)
MF(INR cr)	3,367.7	3,367.7	1,950.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	199,275	135,719	118,545
F&O(INR cr)	61,123,935	40,590,118	35,902,447

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.2	13.1	14.5
NSE VIX	18.9	22.2	16.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	49,055	4.5 %	3.1 %	Energy	38,712	2.9 %	(2.0) %
IT	33,088	2.4 %	(5.6) %	Pharma	19,281	3.6 %	0.4 %
Metals	9,497	5.8 %	10.9 %	Finance	21,683	4.1 %	2.3 %
Auto	24,284	4.7 %	13.6 %	PSU	6,990	2.9 %	(1.7) %
FMCG	57,567	4.3 %	6.8 %	Real Estate	1,001	2.5 %	6.5 %

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 Gree	1,829	11.1 %	(3.1) %	Adani Ener	952	(2.6) %	(14.4) %
Adani Port	1,355	8.5 %	(1.5) %				
Trent	4,904	8.1 %	26.2 %				
IndusInd B	1,501	7.9 %	(2.7) %				
United Spi	1,299	7.8 %	12.1 %				

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	06-06-2024	07:00	AUD	-	-
Trade Balance	06-06-2024	18:00	CAD	-	-
Ivey PMI	06-06-2024	19:30	CAD	-	63
Unemployment Rate	06-06-2024	11:15	CHF	-	0.023
German Factory Orders m/m	06-06-2024	11:30	EUR	-	(0.004)
Italian Retail Sales m/m	06-06-2024	13:30	EUR	-	0
Retail Sales m/m	06-06-2024	14:30	EUR	-	0.008
Main Refinancing Rate	06-06-2024	17:45	EUR	-	0.045
ECB Press Conference	06-06-2024	18:15	EUR	-	-
Construction PMI	06-06-2024	14:00	GBP	-	53
30-y Bond Auction	06-06-2024	09:05	JPY	-	-
ANZ Commodity Prices m/m	06-06-2024	06:30	NZD	-	0.005
Challenger Job Cuts y/y	06-06-2024	17:00	USD	-	(0.033)
Natural Gas Storage	06-06-2024	20:00	USD	-	-

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