



07 May.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,443	(0.1) %	(0.1) %
BSE SENSEX	73,896	0.0 %	(0.2) %
CNX BANK	48,895	(0.1) %	2.8 %
CNX MIDCAP	50,662	(0.5) %	3.6 %
CNX SMALLCAP	16,683	(1.5) %	5.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,852	0.5 %	3.0 %
S&P 500	5,181	1.0 %	9.2 %
FTSE 100	8,213	0.5 %	6.4 %
HANG SENG	18,578	0.6 %	10.7 %
NIKKEI	38,236	(0.1) %	14.9 %
SHANGHAI COMPOSITE	3,141	1.2 %	6.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.43	(0.0) %	0.5 %
EUR/USD	1.07	0.3 %	(2.9) %
GBP/USD	1.25	0.2 %	(1.6) %
USD/JPY	154.68	(1.7) %	9.6 %
USD/AUD	1.53	(0.8) %	4.0 %
USD/SGD	1.36	(0.4) %	2.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	79	(4.5) %	12.2 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,303	0.1 %	10.8 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,517	0.3 %	7.7 %
Copper(USD/MT)	9,737	0.8 %	15.5 %

FIXED INCOME

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

Global Economy: The euro area private sector growth accelerated to an 11-month high in April driven by the service sector, final survey results from S&P Global showed on Monday. The HCOB composite output index rose to 51.7 in April from 50.3 in the previous month. The flash estimate was 51.4. The score was above the 50.0 mark which separates growth from contraction for the second straight month. The improvement was driven solely by the service sector as manufacturing output continued to fall. The HCOB services PMI advanced to 53.3 in April from 51.5 in March. The reading was above the preliminary estimate of 52.9. Overall, the increase pointed to the strongest expansion in services activity in just less than a year. Eurozone producer prices logged a further steep decline in March amid a continued downward trend in energy prices, data published by Eurostat showed on Monday. Producer prices fell 7.8 percent year-over-year in March, slightly slower than the revised 8.5 percent decrease in February. The services sector in Japan continued to expand in April, and at a faster pace, the latest survey from Jibun Bank revealed on Tuesday with a services PMI score of 54.3. That's up from 54.1 in March, and it moves further above the boom-or-bust line of 50 that separates expansion from contraction.

Global Indices: The Nasdaq surged 192.92 points or 1.2 percent to 16,349.25, the S&P 500 jumped 52.95 points or 1.0 percent to 5,180.74 and the Dow climbed 176.59 points or 0.5 percent to 38,862.27.

Indian Economy: The seasonally adjusted HSBC India Services Business Activity Index fell from 61.2 in March to 60.8 in April, highlighting one of the strongest growth rates seen in just less than 14 years. Meanwhile, the HSBC India Composite PMI Output Index moderated to 61.5 in April, from 61.8 in March, the latest reading was one of the highest seen in close to 14 years and signaled a substantial rate of expansion across the private sector.

Equity Market: The S&P BSE Sensex managed a marginal gain of 0.02%, closing at 73,895.54. However, the Nifty 50 index inched down by 0.15%, settling at 22,442.70.

Corporate News: Godrej Consumer Products has posted a net loss of Rs 1,893.2 crore for the quarter ended March FY24 despite healthy operating numbers, impacted by an exceptional loss of Rs 2,375.65 crore for the quarter (against an exceptional loss of Rs 22.2 crore in the year-ago period). Gujarat Fluorochemicals has reported consolidated net profit at Rs 101 crore for the March FY24 quarter, falling sharply by 70 percent compared to the year-ago period. Revenue from operations for the quarter stood at Rs 1,133 crore, declining 23 percent compared to the same period in the in the previous fiscal.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(256.4)	(169.9)	(71.8)
MF(INR cr)	1,728.3	1,728.3	1,645.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	8,534	92,284	101,412
F&O(INR cr)	23,964,817	27,634,797	34,952,830

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.5	14.5	16.0
NSE VIX	16.6	14.9	12.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	48,895	(0.1) %	2.8 %	Energy	39,882	(1.7) %	1.0 %
IT	33,217	0.9 %	(5.2) %	Pharma	19,203	0.4 %	(0.0) %
Metals	9,190	(0.9) %	7.3 %	Finance	21,744	(0.2) %	2.6 %
Auto	22,527	(0.1) %	5.3 %	PSU	7,253	(3.7) %	2.0 %
FMCG	54,660	0.7 %	1.4 %	Real Estate	989	2.8 %	5.2 %

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>
Britannia	5,062	6.7 %	3.4 %	Power Fin.	438	(8.9) %	9.1 %
Kotak Mah.	1,624	5.0 %	(9.3) %	REC Ltd	517	(7.4) %	12.2 %
A B B	6,940	3.6 %	6.7 %	Titan Comp	3,280	(7.2) %	(12.3) %
Siemens	6,108	3.0 %	11.8 %	Punjab Nat	127	(6.4) %	1.2 %
Marico	530	2.6 %	7.0 %	Canara Ban	592	(5.4) %	0.5 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Cash Rate	07-05-2024	10:00	AUD	-	0.0435
RBA Press Conference	07-05-2024	11:00	AUD	-	-
Ivey PMI	07-05-2024	19:30	CAD	-	57.5
Unemployment Rate	07-05-2024	11:15	CHF	-	0.023
Foreign Currency Reserves	07-05-2024	12:30	CHF	-	-
German Factory Orders m/m	07-05-2024	11:30	EUR	-	0.002
French Prelim Private Payrolls q/q	07-05-2024	12:15	EUR	-	(0.001)
Retail Sales m/m	07-05-2024	14:30	EUR	-	(0.005)
German Buba President Nagel Speaks	07-05-2024	22:30	EUR	-	-
BRC Retail Sales Monitor y/y	07-05-2024	04:31	GBP	-	0.032
Construction PMI	07-05-2024	14:00	GBP	-	50.2

..... End of Report