



09 Apr.2024

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,666	0.7 %	0.9 %
BSE SENSEX	74,743	0.7 %	1.0 %
CNX BANK	48,582	0.2 %	2.1 %
CNX MIDCAP	50,041	0.0 %	2.3 %
CNX SMALLCAP	16,407	0.3 %	4.1 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,893	(0.0) %	3.1 %
S&P 500	5,202	(0.0) %	9.7 %
FTSE 100	7,943	0.4 %	2.9 %
HANG SENG	16,733	0.1 %	(0.3) %
NIKKEI	39,347	0.9 %	18.2 %
SHANGHAI COMPOSITE	3,047	(0.7) %	2.9 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	83.43	(0.0) %	0.5 %
EUR/USD	1.08	0.5 %	(1.7) %
GBP/USD	1.27	0.4 %	(0.6) %
USD/JPY	151.59	(0.1) %	7.5 %
USD/AUD	1.52	(0.9) %	3.2 %
USD/SGD	1.35	(0.2) %	2.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	87	(0.0) %	23.5 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,330	2.3 %	12.1 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,391	(0.1) %	2.3 %
Copper(USD/MT)	9,198	(0.6) %	9.1 %

**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:** Germany's industrial production growth accelerated more than expected in February but exports declined amid rising imports, pushing the trade surplus below expectations, official data revealed on Monday. Industrial output posted a monthly growth of 2.1 percent, following a revised 1.3 percent rise in January, Destatis reported. Nonetheless, on a yearly basis, industrial production plunged 4.9 percent after easing 5.3 percent a month ago. Data showed that exports declined more than expected in February after recovering a month ago. Exports dropped 2.0 percent month-on-month, in contrast to the 6.3 percent increase in January. Meanwhile, imports logged an unexpected growth of 3.2 percent after rising 3.3 percent a month ago. As a result, the trade surplus fell to a seasonally adjusted EUR 21.4 billion from EUR 27.6 billion in January. On a yearly basis, exports slid 1.2 percent, reversing a 1.6 percent rise. At the same time, the annual fall in imports slowed to 6.7 percent from 7.5 percent. Euro area investor confidence strengthened for the sixth month in a row to reach a 26-month high in April as expectations turned positive for the first time since the start of the war in Ukraine. The headline investor sentiment index advanced to -5.9 in April from -10.5 in March, data from the behavioral research institute Sentix showed Monday.

**Global Indices:** While the Nasdaq crept up 5.44 points or less than a tenth of a percent to 16,253.96, the Dow edged down 11.24 points or less than a tenth of a percent to 38,892.80 and the S&P 500 slipped 1.95 points or less than a tenth of a percent to 5,202.39.

**Indian Economy:** The Indian Auto Retail sector witnessed a growth of 3.14% Y-o-Y, with significant growth of 5% and 17% in the 2W and 3W segments, according to data from Federation of Automobile Dealers Associations (FADA). However, the Passenger Vehicles or PV segment faced a downturn with a 2% M-o-M and a 6% Y-o-Y sales decline, attributed to heavy discounting and selective financing. The commercial vehicles or CV segment which fell by 6% Y-o-Y navigated through a complex environment, balancing election-induced purchase slowdowns with strong demand in specific sectors like coal and cement transportation.

**Equity Market:** In the barometer index, the S&P BSE Sensex, gained 494.28 points or 0.67% to 74,742.50. The Nifty 50 index added 152.60 points or 0.68% to 22,666.30.

**Corporate News:** Tata Motors' Jaguar Land Rover (JLR) reported over 20 percent year-on-year growth in its full-year sales on improved production and sustained global demand. Wholesale volumes of 1.1 lakh units in Q4 FY24 (excluding the China JV) were up 16 percent compared to the same quarter a year ago, and the same in FY24 increased 25 percent YoY to 4.01 lakh units. Sula Vineyards has recorded 10 percent growth in net revenue for Q4 as well as FY24. Net revenue for the March FY24 quarter stood at Rs 131.8 crore against Rs 120 crore in the same period last year, while full-year revenue came in at Rs 608.6 crore against Rs 553.4 crore in the previous year.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	229.6	(22.9)	(22.9)
MF(INR cr)	(1,345.5)	157.9	157.9

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	101,956	106,627	106,627
F&O(INR cr)	24,841,881	35,125,813	35,125,813

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.0	15.0	15.0
NSE VIX	11.6	11.5	11.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	48,582	0.2 %	2.1 %	Energy	39,951	1.3 %	1.2 %
IT	35,064	(0.5) %	0.1 %	Pharma	19,219	0.3 %	0.1 %
Metals	8,795	1.1 %	2.7 %	Finance	21,605	0.2 %	1.9 %
Auto	22,068	2.2 %	3.2 %	PSU	7,241	(0.9) %	1.8 %
FMCG	53,966	0.1 %	0.1 %	Real Estate	950	1.3 %	1.1 %

### 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>
Info Edg.(	6,225	9.7 %	9.0 %	REC Ltd	454	(3.8) %	(1.5) %
GAIL (Indi	201	5.2 %	10.1 %	Varun Beve	1,450	(2.9) %	3.8 %
Eicher Mot	4,206	4.3 %	6.6 %	Punjab Nat	133	(2.7) %	5.8 %
Maruti Suz	12,865	3.6 %	2.4 %	Adani Powe	611	(2.5) %	9.0 %
M & M	2,078	3.2 %	8.5 %	Adani Port	1,349	(2.0) %	(2.0) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Westpac Consumer Sentiment	09-04-2024	06:00	AUD	-	(0.018)
NAB Business Confidence	09-04-2024	07:00	AUD	-	0
Gov Board Member Schlegel Speaks	09-04-2024	22:00	CHF	-	-
French Trade Balance	09-04-2024	12:15	EUR	-	-
BRC Retail Sales Monitor y/y	09-04-2024	04:31	GBP	-	0.01
Consumer Confidence	09-04-2024	10:30	JPY	-	39.1
Prelim Machine Tool Orders y/y	09-04-2024	11:30	JPY	-	(0.08)
NZIER Business Confidence	09-04-2024	03:30	NZD	-	(2)
NFIB Small Business Index	09-04-2024	15:30	USD	-	89.4

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