



10 May.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	21,958	(1.5) %	(2.2) %
BSE SENSEX	72,404	(1.4) %	(2.2) %
CNX BANK	47,488	(1.1) %	(0.2) %
CNX MIDCAP	49,109	(1.9) %	0.4 %
CNX SMALLCAP	15,996	(2.8) %	1.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	39,388	0.9 %	4.4 %
S&P 500	5,214	0.5 %	9.9 %
FTSE 100	8,381	0.3 %	8.5 %
HANG SENG	18,538	1.2 %	10.4 %
NIKKEI	38,074	(0.3) %	14.4 %
SHANGHAI COMPOSITE	3,154	0.8 %	6.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.48	0.0 %	0.5 %
EUR/USD	1.08	(0.1) %	(2.5) %
GBP/USD	1.25	(0.2) %	(1.5) %
USD/JPY	154.50	0.4 %	9.5 %
USD/AUD	1.51	0.3 %	3.0 %
USD/SGD	1.35	0.2 %	2.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	78	0.0 %	11.4 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,312	(0.2) %	11.2 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,488	(1.0) %	6.5 %
Copper(USD/MT)	9,740	(1.1) %	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	0.0 %	0.6 %

Global Economy: First-time claims for U.S. unemployment benefits rose by much more than expected in the week ended May 4th, according to a report released by the Labor Department on Thursday. The report said initial jobless claims climbed to 231,000, an increase of 22,000 from the previous week's revised level of 209,000. The Bank of England left its key policy rate unchanged for the sixth consecutive meeting and signaled that the first rate cut since 2020 is on the horizon. The Monetary Policy Committee decided to hold the Bank Rate at 5.25 percent again in a split vote. The bank forecast the economy to grow only 0.2 percent in the second quarter after an estimated 0.4 percent growth in the first quarter. Consumer price inflation is expected to return to close to the target in the near term, but to increase slightly in the second half of this year, to around 2.5 percent due to the unwinding of energy-related base effects. Inflation is projected to be 1.9 percent in two years' time and 1.6 percent in three years. Japan posted a current account surplus of 3.398 trillion yen in March, the Ministry of Finance said on Friday - up 44 percent from the previous year. Imports were down 3.8 percent on year to 8.879 trillion yen, while exports added an annual 6.5 percent to 9.370 trillion yen for a trade surplus of 491.0 billion yen. The capital account saw a shortfall of 27.7 billion yen, while the financial account had a surplus of 2.478 trillion yen.

Global Indices: The Dow jumped 331.37 points or 0.9 percent to 39,387.76, the S&P 500 climbed 26.41 points or 0.5 percent to 5,214.08 and the Nasdaq rose 43.51 points or 0.3 percent to 16,346.26.

Indian Economy: The Reserve Bank of India (RBI) has reported that currency in circulation edged up 0.1% on the week to stand at Rs 35.71 lakh crore as on May 3, 2024. The central bank stated further that the overall reserve money contracted by 1% on the week to Rs 46.85 lakh crore. Currency in circulation rose 2.7% on a year ago basis compared to 7.5% gain at the same time last year. In the current fiscal, the currency in circulation has gained by 1.6% so far while the reserve money has edged up marginally by 0.1%.

Equity Market: The benchmark Sensex tanked a hefty 1,062 points (1.45%) to settle at 72,404. The broader Nifty 50 followed suit, plummeting 345 points (1.55%) to close at 21,957.

Corporate News: Bharat Petroleum Corporation Limited reported a consolidated net profit of Rs 4,789.57 crore in Q4 FY24, a decline of 30 percent Y-o-Y. BPCL's revenue from operations declined marginally to Rs 1.32 lakh crore in the same period. Abott India reported a 24 percent Y-o-Y growth in net profit at Rs 287 crore in Q4 FY24. The company's revenue increased 7 percent to Rs 1,439 crore from Rs 1,343 crore in the year-ago period.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(639.0)	(293.8)	(111.6)
MF(INR cr)	926.9	1,016.6	1,559.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	109,436	101,223	102,421
F&O(INR cr)	44,121,474	37,389,009	36,359,413

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.0	13.9	15.7
NSE VIX	18.2	16.2	12.8

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	47,488	(1.1) %	(0.2) %	Energy	38,458	(3.0) %	(2.6) %
IT	33,206	(0.4) %	(5.2) %	Pharma	18,437	(2.2) %	(4.0) %
Metals	8,841	(2.9) %	3.3 %	Finance	21,094	(1.6) %	(0.5) %
Auto	22,633	0.8 %	5.8 %	PSU	7,095	(0.7) %	(0.3) %
FMCG	54,625	(2.5) %	1.4 %	Real Estate	939	(2.2) %	(0.0) %

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 Powe	613	5.5 %	9.3 %	Larsen & T	3,275	(6.1) %	(14.7) %
TVS Motor	2,064	3.4 %	(3.5) %	Power Fin.	418	(5.2) %	4.2 %
Hero Motoc	4,765	3.3 %	1.8 %	Tata Power	414	(5.0) %	1.6 %
Tata Motor	1,030	1.8 %	3.8 %	Asian Pain	2,710	(4.7) %	(5.6) %
Tata Motor	693	1.7 %	5.1 %	B P C L	592	(4.5) %	(1.4) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Employment Change	10-05-2024	18:00	CAD	-	-
Italian Industrial Production m/m	10-05-2024	13:30	EUR	-	0.001
ECB Monetary Policy Meeting Accounts	10-05-2024	17:00	EUR	-	-
GDP m/m	10-05-2024	11:30	GBP	-	0.001
MPC Member Pill Speaks	10-05-2024	16:45	GBP	-	-
Household Spending y/y	10-05-2024	05:00	JPY	-	(0.005)
Bank Lending y/y	10-05-2024	05:20	JPY	-	0.032
30-y Bond Auction	10-05-2024	09:05	JPY	-	-
Economy Watchers Sentiment	10-05-2024	10:30	JPY	-	49.8
BusinessNZ Manufacturing Index	10-05-2024	04:00	NZD	-	47.1
Prelim UoM Consumer Sentiment	10-05-2024	19:30	USD	-	77.2
Federal Budget Balance	10-05-2024	23:30	USD	-	-

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