



10 Jun.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	23,290	2.1 %	3.7 %
BSE SENSEX	76,693	2.2 %	3.6 %
CNX BANK	49,803	1.0 %	4.7 %
CNX MIDCAP	53,195	1.5 %	8.8 %
CNX SMALLCAP	17,216	2.3 %	9.2 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,799	(0.2) %	2.9 %
S&P 500	5,347	(0.1) %	12.7 %
FTSE 100	8,245	(0.5) %	6.8 %
HANG SENG	18,367	(0.6) %	9.4 %
NIKKEI	38,684	(0.1) %	16.2 %
SHANGHAI COMPOSITE	3,051	0.1 %	3.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.46	0.1 %	0.5 %
EUR/USD	1.09	0.1 %	(1.4) %
GBP/USD	1.28	0.1 %	0.5 %
USD/JPY	155.88	(0.0) %	10.5 %
USD/AUD	1.50	(0.1) %	2.2 %
USD/SGD	1.35	(0.1) %	2.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	76	2.0 %	7.3 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,294	(3.5) %	10.4 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,579	(0.3) %	10.4 %
Copper(USD/MT)	9,840	(0.9) %	16.7 %

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 %	0.6 %

Global Economy: Employment in the U.S. shot up by far more than economists had been expecting in the month of May, according to a closely watched report released by the Labor Department. The Labor Department said non-farm payroll employment surged by 272,000 jobs in May after climbing by a downwardly revised 165,000 jobs in April. Meanwhile, the Labor Department said the unemployment rate crept up to 4.0 percent in May from 3.9 percent in April. The report also said average hourly employee earnings climbed \$0.14 or 0.4 percent to \$34.91. Wholesale inventories in the U.S. crept up by slightly less than expected in the month of April, according to a report released by the Commerce Department. The Commerce Department said wholesale inventories inched up by 0.1 percent in April. The report said wholesale sales also edged up by 0.1 percent in April. The euro area economy recovered as initially estimated in the first quarter, driven by household spending along with favorable net exports, the latest data from Eurostat showed. Gross domestic product grew 0.3 percent sequentially. On a yearly basis, economic growth improved to 0.4 percent from 0.2 percent. The quarterly growth in employment remained unchanged at 0.3 percent in the first quarter, as estimated. Japan's gross domestic product contracted a seasonally adjusted 0.5 percent on quarter in the first quarter of 2024, the Cabinet Office said. GDP was up 0.1 percent on quarter in the fourth quarter of 2023. On an annualized basis, GDP was revised up to -1.8 percent from the estimate of -2.0 percent.

Global Indices: For the week, the Nasdaq surged by 2.4 percent and the S&P 500 jumped by 1.3 percent. The narrower Dow posted a more modest gain, rising by 0.3 percent.

Indian Economy: The Reserve Bank of India (RBI) monetary policy committee (MPC) has voted to keep the repo rate unchanged at 6.5%. Consequently, the standing deposit facility (SDF) rate remains unchanged at 6.25% and the marginal standing facility (MSF) rate and the Bank Rate at 6.75%. The projected real GDP growth for 2024-25 has been revised upward to 7.2%. The projected CPI inflation for 2024-25 remains unchanged at 4.5%.

Equity Market: The barometer index, the S&P BSE Sensex was surged 1,618.85 points or 2.16% to 76,693.36. The Nifty 50 index jumped 468.75 points or 2.05% to 23,290.15.

Corporate News: KEC International has secured new orders worth ₹1,061 crore across various sectors. The T&D business won projects in India, East Asia Pacific, and the Americas. The Railways business received orders in both technologically advanced and conventional segments within India. Additionally, the Cables business secured orders for supplying conductors and cables to a prominent infrastructure player in India. This brings the Year-to-Date order intake to ₹3,000 crore. In the financial year 2024, Adani Airports handled over one million tonnes of cargo, securing a 30.1% market share. The company achieved a 7% year-on-year growth, with international cargo tonnage increasing by 9% compared to the previous year.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(811.2)	(507.3)	(146.4)
MF(INR cr)	2,826.1	(26.8)	1,796.5

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	148,354	143,114	120,063
F&O(INR cr)	11,929,357	46,222,882	36,701,153

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.2	12.7	14.4
NSE VIX	16.9	20.1	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	49,803	1.0 %	4.7 %	Energy	40,283	2.4 %	2.0 %
IT	35,170	3.4 %	0.4 %	Pharma	19,578	1.8 %	1.9 %
Metals	9,834	2.1 %	14.8 %	Finance	22,166	1.2 %	4.6 %
Auto	25,020	2.6 %	17.0 %	PSU	7,282	1.2 %	2.4 %
FMCG	57,953	1.0 %	7.5 %	Real Estate	1,070	2.1 %	13.8 %

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>
M & M	2,857	5.8 %	49.1 %	SBI Life I	1,426	(1.2) %	(4.3) %
Wipro	485	5.1 %	(0.1) %	Tata Consu	1,136	(0.4) %	4.5 %
Tech Mahin	1,378	4.6 %	10.7 %	Jindal Ste	1,027	(0.3) %	18.3 %
Infosys	1,534	4.2 %	2.6 %	Bosch	30,597	(0.2) %	1.0 %
UltraTech	10,463	4.1 %	5.1 %	Adani Gree	1,864	(0.1) %	(1.3) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
SECO Consumer Climate	10-06-2024	12:30	CHF	-	(38)
Italian Industrial Production m/m	10-06-2024	13:30	EUR	-	(0.005)
Sentix Investor Confidence	10-06-2024	14:00	EUR	-	(3.6)
German Buba President Nagel Speaks	10-06-2024	15:00	EUR	-	-
Bank Lending y/y	10-06-2024	05:20	JPY	-	0.031
Economy Watchers Sentiment	10-06-2024	10:30	JPY	-	47.4

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