



12 Apr.2024

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| CNX NIFTY | 22,754 | 0.5 % | 1.3 % |
| BSE SENSEX | 75,038 | 0.5 % | 1.4 % |
| CNX BANK | 48,987 | 0.5 % | 3.0 % |
| CNX MIDCAP | 50,380 | 1.0 % | 3.0 % |
| CNX SMALLCAP | 16,571 | 0.7 % | 5.1 % |
| GLOBAL INDICES | LATEST | % 1D | % YTD |
| DOW JONES | 38,459 | (0.0) % | 2.0 % |
| S&P 500 | 5,199 | 0.7 % | 9.6 % |
| FTSE 100 | 7,924 | (0.5) % | 2.6 % |
| HANG SENG | 17,095 | (0.3) % | 1.8 % |
| NIKKEI | 39,443 | (0.4) % | 18.5 % |
| SHANGHAI COMPOSITE | 3,034 | 0.2 % | 2.4 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 83.22 | (0.1) % | 0.2 % |
| EUR/USD | 1.09 | 0.2 % | (1.6) % |
| GBP/USD | 1.27 | 0.3 % | (0.5) % |
| USD/JPY | 151.81 | (0.0) % | 7.6 % |
| USD/AUD | 1.51 | (0.4) % | 2.9 % |
| USD/SGD | 1.35 | (0.2) % | 2.0 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| WTI Crude(USD/bbl) | 85 | (1.9) % | 21.1 % |
| Gold(INR/10g) | 51,317 | 0.1 % | 6.6 % |
| Gold Comex(USD/oz) | 2,346 | (0.3) % | 12.9 % |
| SILVER(INR/1Kg) | 66,740 | (0.3) % | 7.5 % |
| Aluminium(USD/MT) | 2,403 | (0.5) % | 2.8 % |
| Copper(USD/MT) | 9,295 | (0.0) % | 10.3 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec India | 8.3 | (0.0) % | 0.1 % |
| 10 Y GSec US 10 | 4.6 | 0.2 % | 0.7 % |

Global Economy: The Labor Department released a report on Thursday showing U.S. producer price index for final demand crept up by 0.2 percent in March after climbing by 0.6 percent in February. Meanwhile, the report said the annual rate of producer price growth accelerated to 2.1 percent in March from 1.6 percent in February. The Labor Department released a separate report on Wednesday showing U.S. consumer prices advanced by slightly more than expected in the month of March. Consumer prices climbed by 0.4 percent in March, matching the increase seen in February. A report released by the Commerce Department on Wednesday showed wholesale inventories in the U.S. climbed by 0.5 percent in February after edging down by a revised 0.2 percent in January. The European Central Bank left its key interest rates unchanged on Thursday, but signaled policymakers are gaining confidence on inflation returning to the 2 percent target and could lower rates in coming months. The Governing Council left the main refinancing rate, or refi, unchanged at 4.50 percent. The deposit facility rate was held steady a record high 4.00 percent and the lending rate was retained at 4.75 percent. Consumer prices in China fell 1.0 percent on month in March, the National Bureau of Statistics said on Thursday. On a yearly basis, inflation rose 0.1 percent. The bureau also said that producer prices were down 2.8 percent on year. The manufacturing sector in New Zealand continued to contract in March, and at a faster pace, the latest survey from BusinessNZ revealed with a Performance of Manufacturing Index score of 47.1.

Global Indices: The S&P 500 also climbed 38.42 points or 0.7 percent to 5,199.06, but the narrower Dow edged down 2.43 points or less than a tenth of a percent to 38,459.08.

Indian Economy: The Ministry of New & Renewable Energy, Government of India has issued Guidelines for implementation of R&D Scheme under the National Green Hydrogen Mission. The R&D scheme seeks to make the production, storage, transportation and utilization of green hydrogen more affordable. It also aims to improve the efficiency, safety and reliability of the relevant processes and technologies involved in the green hydrogen value chain.

Equity Market: The BSE Sensex gained 354.45 points or 0.47% to close at 75,038.15 and the NSE Nifty rose 111.05 or 0.49% to settle at 22,753.80.

Corporate News: Phoenix Mills reported total consumption at Rs 2,818 crore for the quarter ended March FY24, growing 27 percent over a year-ago period, while gross retail collections increased by 37 percent YoY to Rs 791 crore during the same period. In FY24, total consumption rose 22 percent to Rs 11,327 crore, and gross retail collections jumped 27 percent to Rs 2,743 crore compared to the previous year. Landmark Cars has incorporated a wholly owned subsidiary company, namely Landmark Premium Cars (LPCPL), to conduct the business of sales, after-sales, and allied business.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 1,023.4 | 186.3 | 186.3 |
| MF(INR cr) | (25.5) | (488.4) | (488.4) |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 101,943 | 105,161 | 105,161 |
| F&O(INR cr) | 57,031,554 | 38,850,950 | 38,850,950 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 15.8 | 15.1 | 15.1 |
| NSE VIX | 11.1 | 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 | 48,987 | 0.5 % | 3.0 % | Energy | 40,120 | 1.1 % | 1.6 % |
| IT | 35,293 | 0.6 % | 0.7 % | Pharma | 19,117 | (0.3) % | (0.5) % |
| Metals | 9,000 | 1.2 % | 5.1 % | Finance | 21,718 | 0.2 % | 2.4 % |
| Auto | 21,985 | (0.1) % | 2.8 % | PSU | 7,290 | 1.5 % | 2.5 % |
| FMCG | 54,291 | 1.2 % | 0.7 % | Real Estate | 961 | 0.6 % | 2.2 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Vedanta | 362 | 7.0 % | 25.8 % | Info Edg.(| 6,083 | (2.4) % | 6.6 % |
| United Spi | 1,200 | 6.4 % | 3.6 % | HDFC Life | 622 | (2.0) % | (2.1) % |
| Interglobe | 3,795 | 4.4 % | 6.9 % | Cipla | 1,423 | (1.9) % | (5.1) % |
| Coal India | 456 | 3.8 % | 3.2 % | Divi's Lab | 3,739 | (1.7) % | 4.8 % |
| B P C L | 605 | 3.2 % | 0.7 % | Maruti Suz | 12,683 | (1.6) % | 0.9 % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|-----------------------------------|-------------|------------------|---------------|---------------|-----------------------|
| German Final CPI m/m | 12-04-2024 | 11:30 | EUR | - | 0.004 |
| French Final CPI m/m | 12-04-2024 | 12:51 | EUR | - | 0.002 |
| MPC Member Greene Speaks | 12-04-2024 | 13:10 | GBP | - | - |
| Revised Industrial Production m/m | 12-04-2024 | 10:00 | JPY | - | (0.001) |
| BusinessNZ Manufacturing Index | 12-04-2024 | 04:00 | NZD | - | 49.3 |
| FPI m/m | 12-04-2024 | 04:15 | NZD | - | (0.006) |
| Import Prices m/m | 12-04-2024 | 18:00 | USD | - | 0.003 |
| Prelim UoM Consumer Sentiment | 12-04-2024 | 19:30 | USD | - | 79.4 |

..... End of Report