



12 Jun.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	23,265	0.0 %	3.6 %
BSE SENSEX	76,457	(0.0) %	3.3 %
CNX BANK	49,706	(0.2) %	4.5 %
CNX MIDCAP	53,667	0.8 %	9.7 %
CNX SMALLCAP	17,572	0.6 %	11.4 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,747	(0.3) %	2.7 %
S&P 500	5,375	0.3 %	13.3 %
FTSE 100	8,148	(1.0) %	5.5 %
HANG SENG	18,176	(1.0) %	8.3 %
NIKKEI	39,135	0.3 %	17.6 %
SHANGHAI COMPOSITE	3,028	(0.8) %	2.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.51	0.1 %	0.6 %
EUR/USD	1.08	(0.8) %	(2.2) %
GBP/USD	1.27	(0.6) %	(0.1) %
USD/JPY	156.80	0.6 %	11.1 %
USD/AUD	1.52	1.2 %	3.4 %
USD/SGD	1.35	0.4 %	2.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	78	2.9 %	10.5 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,303	0.4 %	10.8 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,516	(2.4) %	7.7 %
Copper(USD/MT)	9,695	(1.5) %	15.0 %

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: U.S. small business sentiment increased for a second month in a row in May to reach its highest level thus far this year, but the uncertainty perception rose to its highest in three-and-a-half years ahead of the general election, and inflation remained the main worry for business owners, results of a survey by the National Federation of Independent Business showed Tuesday. The NFIB Small Business Optimism Index gained 0.8 points to reach 90.5, but the reading remained below the historical average of 98 for the 29th month. Consumer prices in China were up 0.3 percent on year in May, the National Bureau of Statistics said on Wednesday. On a monthly basis, inflation fell 0.1 percent versus forecasts for a flat reading after rising 0.1 percent in April. The bureau also said that producer prices slumped an annual 1.4 percent. The UK unemployment rate rose slightly in three months to April and wage growth remained strong, the Office for National Statistics reported. The unemployment rate rose to 4.4 percent in the three months to April from 4.3 percent in three months to March. In three months to April, average earnings excluding bonus grew 6.0 percent from the previous year. Producer prices in Japan were up 0.7 percent on month in May, the Bank of Japan said on Wednesday. On a yearly basis, producer prices climbed 2.4 percent. The export price index rose 0.1 percent on month, the bank said, while the import price index rose 0.9 percent.

Global Indices: The Nasdaq jumped 151.07 points or 0.9 percent to 17,343.55 and the S&P 500 rose 14.53 points or 0.3 percent to 5,375.32, but the Dow fell 120.62 points or 0.3 percent to 38,747.42.

Indian Economy: The World Bank on June 11 retained its GDP growth projection for India at 6.6 percent in FY25. World Bank sees India's GDP growth at 6.7 percent in FY26 and 6.8 percent in FY27. After a high growth rate in 2023-24, steady growth of 6.7 percent per year, on average, is projected for the three fiscal years beginning in 2024-25, according to its Global Economic Prospects for June 2024.

Equity Market: The S&P BSE Sensex fell 33.49 points or 0.04% to 76,456.59. The Nifty 50 index rose 5.65 points or 0.02% to 23,264.85.

Corporate News: HCL Technologies has signed deal with Deutsche Apotheker- und (apoBank), Germany's largest cooperative private bank worth \$278 million over a period of 7.5 years. TVS Supply Chain Solutions has announced new five-year strategic contract with Daimler Truck South East Asia Pte. Ltd., a Daimler Truck AG company, for integrated supply chain solutions services in Singapore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	343.5	(174.0)	(117.4)
MF(INR cr)	(840.4)	754.8	1,802.1

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	137,147	180,126	126,291
F&O(INR cr)	41,550,267	42,600,989	36,572,382

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.7	12.7	14.4
NSE VIX	14.8	18.8	16.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	49,706	(0.2) %	4.5 %	Energy	40,621	0.3 %	2.9 %
IT	34,531	0.0 %	(1.5) %	Pharma	19,690	(0.4) %	2.5 %
Metals	9,790	(0.1) %	14.3 %	Finance	22,125	(0.1) %	4.4 %
Auto	25,231	0.8 %	18.0 %	PSU	7,345	0.1 %	3.3 %
FMCG	57,793	(0.3) %	7.2 %	Real Estate	1,096	1.1 %	16.6 %

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>
ONGC	274	5.6 %	1.4 %	Interglobe	4,370	(4.3) %	23.1 %
IRCTC	1,020	4.3 %	5.1 %	ICICI Lomb	1,645	(2.1) %	(3.1) %
GAIL (Indi)	213	2.2 %	16.7 %	Cholaman.I	1,332	(2.0) %	12.4 %
IRFC	176	1.8 %	21.7 %	Avenue Sup	4,701	(1.6) %	4.9 %
Tata Motor	666	1.8 %	1.1 %	Kotak Mah.	1,720	(1.5) %	(3.9) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
CPI y/y	12-06-2024	07:00	CNY	-	0.003
German Final CPI m/m	12-06-2024	11:30	EUR	-	0.001
PPI y/y	12-06-2024	05:20	JPY	-	0.009
Visitor Arrivals m/m	12-06-2024	04:15	NZD	-	0.091
Core CPI m/m	12-06-2024	18:00	USD	-	0.003
Crude Oil Inventories	12-06-2024	20:00	USD	-	-
Federal Funds Rate	12-06-2024	23:30	USD	-	0.055

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