



13 Mar.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,336	0.0 %	28.4 %
BSE SENSEX	73,668	0.2 %	24.6 %
CNX BANK	47,282	(0.1) %	15.9 %
CNX MIDCAP	48,087	(1.4) %	59.4 %
CNX SMALLCAP	15,092	(2.0) %	66.6 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	39,005	0.6 %	3.4 %
S&P 500	5,175	1.1 %	9.1 %
FTSE 100	7,748	1.0 %	0.3 %
HANG SENG	17,094	3.1 %	1.8 %
NIKKEI	38,798	(0.1) %	16.6 %
SHANGHAI COMPOSITE	3,056	(0.4) %	3.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	82.75	(0.1) %	(0.4) %
EUR/USD	1.09	0.6 %	(0.9) %
GBP/USD	1.29	1.1 %	1.0 %
USD/JPY	147.09	(1.7) %	4.3 %
USD/AUD	1.51	(1.3) %	2.8 %
USD/SGD	1.33	(0.7) %	0.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	78	(1.4) %	10.8 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,178	(0.1) %	4.8 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,202	(0.3) %	(5.8) %
Copper(USD/MT)	8,522	(0.4) %	1.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.1	0.0 %	0.2 %

Global Economy: The Treasury Department's Bureau of the Fiscal Service released its monthly budget statement on Tuesday, showing the U.S. budget deficit to \$296.3 billion in February from \$21.9 billion in January. The substantial wider budget deficit largely reflected a steep drop by receipts, which plummeted by 43.2 percent to \$271.1 billion in February from \$477.4 billion in January. Consumer prices in the U.S. increased in line with economist estimates in the month of February, according to a report released by the Labor Department on Tuesday. The Labor Department said its consumer price index climbed by 0.4 percent in February after rising by 0.3 percent in January. The report also said the annual rate of consumer price growth ticked up to 3.2 percent in February from 3.1 percent in January. Core consumer prices rose by 0.4 percent in February. German consumer prices posted its weakest rise since mid-2021, as initially estimated, on weaker energy and food prices in February, final data from Destatis revealed Tuesday. The consumer price inflation slowed to 2.5 percent in February from 2.9 percent in January. Core inflation was 3.4 percent. Inflation, based on the harmonized index of consumer prices or HICP, slowed to 2.7 percent from 3.1 percent. The UK unemployment rate increased unexpectedly in January, while the softening of pay growth soothed fears of inflation building up, data published by the Office for National Statistics showed. The ILO jobless rate rose to 3.9 percent in the three months to January from 3.8 percent in the prior period. At the same time, the employment rate came in at 75.0 percent.

Global Indices: The tech-heavy Nasdaq helped lead the way higher on the day, surging 246.36 points or 1.5 percent to 16,265.63. The S&P 500 also jumped 57.33 points or 1.1 percent to 5,175.27, while the narrower Dow climbed 235.83 points or 0.6 percent to 39,005.49.

Indian Economy: India's headline retail inflation rate was stable at 5.09 percent in February compared to 5.10 percent in January, data released by the statistics ministry showed. Meanwhile, food price inflation advanced to 8.66 percent from 8.30 percent a month ago. Industrial output growth as measured by the Index of Industrial Production (IIP) decelerated to 3.8 percent in January.

Equity Market: In the barometer index, the S&P BSE Sensex gained 165.32 points or 0.22% to 73,667.96. The Nifty 50 index added 3.05 points or 0.01% to 22,335.70.

Corporate News: Muthoot Capital Services, an EV-focused lending platform evfin, a part of NBFC Greaves Finance and energy solutions company Greaves Cotton, signed a partnership with Muthoot Capital Services to launch a co-lending arrangement to increase the availability of electric two-wheeler financing solutions across India. The collaboration entails a total deal size of up to Rs 150 crore. SRF has incorporated a wholly-owned subsidiary, SRF Middle East LLC, in Dubai, to undertake the activity of trading in industrial gases.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	477.2	446.0	105.4
MF(INR cr)	2,592.5	2,210.5	728.6

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	105,268	70,433	84,379
F&O(INR cr)	47,591,473	32,161,062	32,034,973

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.2	14.3	15.2
NSE VIX	13.6	14.4	12.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	47,282	(0.1) %	15.9 %	Energy	39,599	(0.6) %	73.6 %
IT	37,224	0.6 %	30.0 %	Pharma	18,959	(1.3) %	57.1 %
Metals	8,108	(1.7) %	48.0 %	Finance	20,898	0.2 %	15.0 %
Auto	20,932	(0.3) %	68.5 %	PSU	7,039	(2.6) %	87.4 %
FMCG	53,636	(0.8) %	17.3 %	Real Estate	873	(3.7) %	123.3 %

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>
HDFC Bank	1,460	2.2 %	(9.4) %	DLF	864	(5.1) %	139.1 %
TCS	4,192	1.7 %	31.0 %	Tata Power	396	(4.1) %	104.2 %
LTIMindtre	5,209	1.7 %	9.9 %	Bharat Ele	204	(3.9) %	111.4 %
Zomato Ltd	157	1.3 %	202.0 %	Adani Tota	965	(3.5) %	14.2 %
Avenue Sup	4,032	1.3 %	13.4 %	Canara Ban	567	(3.3) %	97.4 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Italian Quarterly Unemployment Rate	13-03-2024	14:30	EUR	-	0.076
Industrial Production m/m	13-03-2024	15:30	EUR	-	0.026
GDP m/m	13-03-2024	12:30	GBP	-	(0.001)
FPI m/m	13-03-2024	03:15	NZD	-	0.009
Crude Oil Inventories	13-03-2024	20:00	USD	-	-
30-y Bond Auction	13-03-2024	22:31	USD	-	-

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