



13 Jun.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	23,323	0.2 %	3.8 %
BSE SENSEX	76,607	0.2 %	3.5 %
CNX BANK	49,895	0.4 %	4.9 %
CNX MIDCAP	54,226	1.0 %	10.9 %
CNX SMALLCAP	17,788	1.2 %	12.8 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,712	(0.1) %	2.6 %
S&P 500	5,421	0.9 %	14.3 %
FTSE 100	8,215	0.8 %	6.4 %
HANG SENG	17,938	(1.3) %	6.8 %
NIKKEI	38,877	(0.7) %	16.8 %
SHANGHAI COMPOSITE	3,037	0.3 %	2.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.51	0.0 %	0.6 %
EUR/USD	1.08	(0.4) %	(2.5) %
GBP/USD	1.27	0.0 %	(0.1) %
USD/JPY	156.99	0.1 %	11.3 %
USD/AUD	1.52	(0.3) %	3.2 %
USD/SGD	1.35	0.1 %	2.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	78	0.2 %	10.7 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,316	0.6 %	11.4 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,475	(1.6) %	5.9 %
Copper(USD/MT)	9,567	(1.3) %	13.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.4	(0.1) %	0.5 %

Global Economy: While announcing its widely expected decision to leave interest rates unchanged on Wednesday, the Federal Reserve also revealed officials now expect only one interest rate cut this year. In support of its goals of maximum employment and inflation at the rate of 2 percent over the longer run, the Fed said it decided to maintain the target range for the federal funds rate at 5.25 to 5.50 percent. The Fed acknowledged modest further progress toward its inflation objective in recent months but said officials still need "greater confidence" inflation is moving sustainably towards the target before they will consider lowering rates. The Labor Department released a report on Wednesday showing U.S. consumer prices were unexpectedly flat in the month of May. The Labor Department said its consumer price index came in unchanged in May after rising by 0.3 percent in April. Core consumer prices rose by 0.2 percent in May after climbing by 0.3 percent in April. The UK economy stagnated in April as services growth was offset by falls in production and construction output, which was largely caused by an unusually wet weather. Gross domestic product remained flat on month, as expected, after expanding 0.4 percent in March, the Office for National Statistics said. Industrial output fell by more-than-expected 0.9 percent on month. Germany's consumer price inflation rose to 2.4 percent in May from April's stable growth of 2.2 percent, data from Destatis revealed Wednesday. EU-harmonized inflation climbed to 2.8 percent from 2.4 percent, as estimated.

Global Indices: The Nasdaq led the charge, surging 264.89 points or 1.5 percent to a new record closing high of 17,608.44. The S&P 500 also reached a new record closing high, jumping 45.71 points or 0.9 percent to 5,421.03.

Indian Economy: India's annual inflation rate based on all India Consumer Price Index (CPI) number came in at 4.75% for the month of May, 2024, according to government data released on Wednesday. Corresponding inflation rate for rural and urban is 5.28% and 4.15%, respectively. India's industrial production grew 5% in April this year mainly due to good show by mining and power sectors, according to official data released on Wednesday. The factory output measured in terms of the Index of Industrial Production (IIP) witnessed a growth of 4.6% in April 2023.

Equity Market: The S&P BSE Sensex rose 149.98 points or 0.20% to 76,606.57. The Nifty 50 index climbed 58.10 points or 0.25% to 23,322.95.

Corporate News: Whirlpool and Hindustan Unilever have announced a new marketing alliance for Surf Excel, Hindustan Unilever's laundry brand. Under this alliance, both brands will engage in joint marketing initiatives. Private equity major Bain Capital, through its affiliates BC Asia Investment VI and BC Asia Growth Investment is likely to exit L&T Finance Holdings by divesting its 3.54% stake at a floor price of Rs 169.17 per share. This divestment, representing approximately 88.2 million shares, is part of a clean-up trade.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	6.8	(148.1)	(114.6)
MF(INR cr)	3,376.1	1,191.7	1,834.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	128,277	173,645	126,331
F&O(INR cr)	59,120,132	44,665,882	37,023,337

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.9	12.8	14.3
NSE VIX	14.4	18.2	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	49,895	0.4 %	4.9 %	Energy	40,996	0.9 %	3.8 %
IT	34,547	0.0 %	(1.4) %	Pharma	19,739	0.3 %	2.8 %
Metals	9,838	0.5 %	14.9 %	Finance	22,232	0.5 %	4.9 %
Auto	25,218	(0.1) %	17.9 %	PSU	7,430	1.2 %	4.4 %
FMCG	57,496	(0.5) %	6.7 %	Real Estate	1,095	(0.0) %	16.5 %

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>
Ambuja Cem	669	4.5 %	7.6 %	Pidilite I	3,079	(3.1) %	0.9 %
Bank of Ba	283	3.1 %	6.2 %	Marico	630	(2.7) %	27.0 %
Jio Financ	361	3.1 %	1.1 %	Zomato Ltd	180	(2.4) %	(2.6) %
Coal India	489	2.6 %	10.6 %	United Spi	1,291	(2.0) %	11.4 %
Power Grid	325	2.6 %	15.9 %	M & M	2,788	(1.7) %	45.5 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Employment Change	13-06-2024	07:00	AUD	-	-
BOC Gov Macklem Speaks	13-06-2024	00:45	CAD	-	-
Gov Council Member Kozicki Speaks	13-06-2024	19:05	CAD	-	-
PPI m/m	13-06-2024	12:00	CHF	-	0.006
German Buba President Nagel Speaks	13-06-2024	01:00	EUR	-	-
Italian Quarterly Unemployment Rate	13-06-2024	13:30	EUR	-	0.074
Industrial Production m/m	13-06-2024	14:30	EUR	-	0.006
RICS House Price Balance	13-06-2024	04:31	GBP	-	(0.05)
BSI Manufacturing Index	13-06-2024	05:20	JPY	-	(6.7)
FOMC Press Conference	13-06-2024	00:00	USD	-	-
Core PPI m/m	13-06-2024	18:00	USD	-	0.005
Natural Gas Storage	13-06-2024	20:00	USD	-	-
Treasury Sec Yellen Speaks	13-06-2024	21:30	USD	-	-
30-y Bond Auction	13-06-2024	22:31	USD	-	-

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