



13 Aug.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	24,347	(0.1) %	8.4 %
BSE SENSEX	79,649	(0.1) %	7.6 %
CNX BANK	50,578	0.2 %	6.3 %
CNX MIDCAP	57,331	0.3 %	17.2 %
CNX SMALLCAP	18,444	0.2 %	17.0 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	39,357	(0.4) %	4.4 %
S&P 500	5,344	0.0 %	12.7 %
FTSE 100	8,210	0.5 %	6.3 %
HANG SENG	17,112	0.1 %	1.9 %
NIKKEI	35,025	0.6 %	5.2 %
SHANGHAI COMPOSITE	2,858	(0.1) %	(3.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.97	0.0 %	1.1 %
EUR/USD	1.09	0.0 %	(1.0) %
GBP/USD	1.27	0.1 %	(0.2) %
USD/JPY	146.70	(0.1) %	4.0 %
USD/AUD	1.52	(0.3) %	3.7 %
USD/SGD	1.33	(0.1) %	0.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	76	(0.8) %	8.3 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,421	(0.4) %	16.5 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,205	(2.6) %	(5.6) %
Copper(USD/MT)	8,649	(1.8) %	2.6 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	3.9	(0.0) %	0.1 %

Global Economy: OPEC downgraded its global oil demand forecast for 2024, now expecting an increase of 2.11 million barrels per day (bpd), slightly lower than the 2.25 million bpd projected last month. The organization also adjusted its demand growth estimate for next year, lowering it to 1.78 million bpd from the previous forecast of 1.85 million bpd. These adjustments reflect the actual data received for Q1 of 2024, and in some cases, the Q2, along with. OPEC noted that while the summer driving season got off to a slower start compared to the previous year, transport fuel demand is anticipated to remain robust, supported by healthy road and air mobility. Germany's wholesale prices continued to fall in July but the pace of decrease was marginal, data from Destatis showed on Monday. Wholesale prices posted an annual drop of 0.1 percent after easing 0.6 percent in June. Month-on-month, wholesale prices gained 0.3 percent, offsetting June's 0.3 percent fall. Australian consumer sentiment improved in early August after the Reserve Bank kept interest rates unchanged and as the effects of recent tax breaks became more apparent, although consumers still remained broadly pessimistic. The Westpac-Melbourne Institute consumer sentiment index rose 2.8% in August, improving from the 1.1% decline seen in the prior month. Japan's producer price index (PPI) rose 0.3% in July from the previous month, driven by increases in the cost of electricity, gas, and agricultural products, the Bank of Japan reported.

Global Indices: While the Dow dipped 140.53 points or 0.4 percent to 39,357.01, the S&P 500 inched up 0.23 points or less than a tenth of a percent to 5,344.39 and the Nasdaq rose 35.31 points or 0.2 percent to 16,780.61.

Indian Economy: India's consumer price inflation eased to a near five-year low of 3.54% in annual terms in July compared with 5.08% in the previous month. Inflation stood at 7.44% in July last year. Annual consumer food price inflation stood at 5.42% in July, sharply falling from 9.36% in last month and also witnessing a massive drop compared to 11.51% in July 2023. India's industrial production growth came in at 4.2 percent in June on a year ago basis, softening compared with 5.9% in the previous month, according to the government data released. The IIP growth rate in June 2023 was 4.0 percent.

Equity Market: The S&P BSE Sensex fell 56.99 points or 0.07% to 79,648.92. The Nifty 50 index declined 20.50 points or 0.08% to 24,347.

Corporate News: JSW Steel is set to acquire up to a 66.7% economic interest in M Resources NSW through the purchase of Class B shares. The acquisition will be made at a cost of \$120 million, with an additional investment obligation of \$50 million. M Resources NSW holds a 30% stake in the mine operator of coking coal mines located in New South Wales, Australia. Vodafone Idea's net loss narrowed in the first quarter of the current financial year. The telecom firm posted a loss of Rs 6,432.1 crore in the June quarter in comparison to a loss of Rs 7,665.9 crore in the same quarter of the last fiscal, according to an exchange filing on Monday.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(138.4)	(199.9)	10.9
MF(INR cr)	(1,306.4)	1,813.9	1,630.6

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	134,222	136,968	136,835
F&O(INR cr)	29,115,066	35,605,843	37,404,298

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	20.4	0	54.1
NSE VIX	15.9	16.3	15.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	50,578	0.2 %	6.3 %	Energy	42,916	(0.7) %	8.7 %
IT	39,110	0.2 %	11.6 %	Pharma	22,206	(0.0) %	15.6 %
Metals	9,106	0.8 %	6.3 %	Finance	23,029	0.2 %	8.6 %
Auto	25,279	(0.3) %	18.2 %	PSU	6,912	(1.2) %	(2.8) %
FMCG	61,668	(0.8) %	14.4 %	Real Estate	1,036	1.3 %	10.2 %

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>
IRFC	185	2.7 %	27.5 %	Life Insur	1,074	(5.2) %	10.7 %
ONGC	341	2.6 %	26.5 %	Adani Tota	834	(4.1) %	(14.0) %
Hero Motoc	5,312	2.0 %	13.5 %	ZyduS Life	1,250	(3.9) %	25.1 %
GAIL (Indi	232	2.0 %	27.2 %	A B B	7,675	(3.7) %	18.0 %
Axis Bank	1,164	1.9 %	10.6 %	Adani Ener	1,063	(3.7) %	(4.4) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Westpac Consumer Sentiment	13-08-2024	06:00	AUD	-	(0.011)
Wage Price Index q/q	13-08-2024	07:00	AUD	-	0.008
German ZEW Economic Sentiment	13-08-2024	14:30	EUR	-	41.8
Claimant Count Change	13-08-2024	11:30	GBP	-	-
PPI y/y	13-08-2024	05:20	JPY	-	0.029
Visitor Arrivals m/m	13-08-2024	04:15	NZD	-	0.04
NFIB Small Business Index	13-08-2024	15:30	USD	-	91.5
Core PPI m/m	13-08-2024	18:00	USD	-	0.004
FOMC Member Bostic Speaks	13-08-2024	22:45	USD	-	-

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