



15 Mar.2024

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|--------|
| CNX NIFTY | 22,147 | 0.7 % | 27.3 % |
| BSE SENSEX | 73,097 | 0.5 % | 23.7 % |
| CNX BANK | 46,790 | (0.4) % | 14.6 % |
| CNX MIDCAP | 46,901 | 2.0 % | 55.5 % |
| CNX SMALLCAP | 14,789 | 3.5 % | 63.2 % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| DOW JONES | 38,906 | (0.4) % | 3.2 % |
| S&P 500 | 5,150 | (0.3) % | 8.6 % |
| FTSE 100 | 7,743 | (0.4) % | 0.3 % |
| HANG SENG | 16,962 | (0.7) % | 1.0 % |
| NIKKEI | 38,807 | 0.3 % | 16.6 % |
| SHANGHAI COMPOSITE | 3,038 | (0.2) % | 2.6 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 82.84 | 0.1 % | (0.3) % |
| EUR/USD | 1.09 | 0.0 % | (0.9) % |
| GBP/USD | 1.28 | (0.3) % | 0.5 % |
| USD/JPY | 147.70 | 0.6 % | 4.7 % |
| USD/AUD | 1.51 | (0.1) % | 2.9 % |
| USD/SGD | 1.33 | 0.1 % | 0.9 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 80 | 2.8 % | 13.3 % |
| Gold(INR/10g) | 51,317 | 0.1 % | 6.6 % |
| Gold Comex(USD/oz) | 2,174 | 0.7 % | 4.6 % |
| SILVER(INR/1Kg) | 66,740 | (0.3) % | 7.5 % |
| Aluminium(USD/MT) | 2,224 | 0.5 % | (4.8) % |
| Copper(USD/MT) | 8,727 | 1.9 % | 3.5 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec India | 8.3 | (0.0) % | 0.1 % |
| 10 Y GSec US 10 | 4.2 | 0.0 % | 0.3 % |

Global Economy: A report released by the Labor Department on Thursday showed producer prices in the U.S. increased by much more than expected in the month of February. The Labor Department said its producer price index for final demand climbed by 0.6 percent in February after rising by 0.3 percent in January. The report also said the annual rate of producer price growth accelerated to 1.6 percent in February. Retail sales in the U.S. rebounded in the month of February, according to a report released by the Commerce Department. The Commerce Department said retail sales climbed by 0.6 percent in February after slumping by a revised 1.1 percent in January. A report released by the Commerce Department on Thursday showed business inventories in the U.S. were unexpectedly flat in the month of January. The Commerce Department said business inventories were virtually unchanged in January after rising by a downwardly revised 0.3 percent in December. While the report said retail inventories rose by 0.4 percent, the increase was offset by a 0.3 percent decline in wholesale inventories and a 0.1 percent dip in manufacturing inventories. Wholesale sales plunged by 1.7 percent during the month, while retail and manufacturing sales slumped by 1.1 percent and 1.0 percent, respectively. Business sales tumbled by 1.3 percent in January after coming in unchanged in December. The manufacturing sector in New Zealand continued to contract in February, albeit at a slower pace, the latest survey from BusinessNZ showed on Friday with a Performance of Manufacturing Index score of 49.3.

Global Indices: The Dow slid 137.66 points or 0.4 percent to 39,905.66, the Nasdaq fell 49.24 points or 0.3 percent to 16,128.53 and the S&P 500 dipped 14.83 points or 0.3 percent to 5,150.48.

Indian Economy: India's wholesale price inflation fell to a four-month low of 0.20% in February, compared to 0.27% in January. Positive rate of inflation in February 2024 is primarily due to increase in prices of food articles, crude petroleum & natural gas, electricity, machinery & equipment and motor vehicles, trailers & semi-trailers, etc.

Equity Market: The S&P BSE Sensex gained 335.39 points or 0.46% to 73,097.28. The Nifty 50 index added 148.95 points or 0.68% to 22,146.65.

Corporate News: Wipro has entered into an agreement with Desjardins to modernize consumer banking services using its NetOxygen Platform. The solution will improve Desjardins' consumer lending and credit card business. Crompton Greaves Consumer Electricals has bagged orders from the Government of Maharashtra, Haryana, and Rajasthan for the supply, installation, testing, and commissioning of solar photovoltaic water pumping systems (SWPS) with PV modules under the PM-KUSUM Scheme.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 1,759.0 | 552.6 | 112.1 |
| MF(INR cr) | (292.4) | 1,906.5 | 735.8 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 123,067 | 84,136 | 84,839 |
| F&O(INR cr) | 52,155,759 | 37,293,002 | 32,252,574 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 13.8 | 14.2 | 15.2 |
| NSE VIX | 13.6 | 14.3 | 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 | 46,790 | (0.4) % | 14.6 % | Energy | 38,160 | 1.9 % | 67.3 % |
| IT | 37,680 | 2.0 % | 31.6 % | Pharma | 18,897 | 1.4 % | 56.6 % |
| Metals | 7,800 | 2.0 % | 42.4 % | Finance | 20,726 | (0.2) % | 14.1 % |
| Auto | 20,514 | 0.9 % | 65.1 % | PSU | 6,785 | 0.7 % | 80.7 % |
| FMCG | 54,146 | 0.9 % | 18.4 % | Real Estate | 832 | 0.6 % | 112.8 % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Adani Tota | 973 | 11.5 % | 15.1 % | Axis Bank | 1,058 | (2.1) % | 22.4 % |
| Adani Ener | 1,055 | 11.2 % | 11.8 % | IndusInd B | 1,477 | (1.7) % | 36.9 % |
| Adani Gree | 1,895 | 9.9 % | 126.3 % | Bajaj Hold | 8,231 | (1.6) % | 41.4 % |
| Adani Ente | 3,087 | 6.2 % | 79.8 % | Shriram Fi | 2,292 | (1.3) % | 78.1 % |
| Life Insur | 959 | 5.4 % | 76.0 % | JSW Steel | 785 | (0.9) % | 15.1 % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|---------------------------------|-------------|------------------|---------------|---------------|-----------------------|
| Housing Starts | 15-03-2024 | 17:45 | CAD | - | - |
| Foreign Securities Purchases | 15-03-2024 | 18:00 | CAD | - | - |
| New Home Prices m/m | 15-03-2024 | 07:00 | CNY | - | (0.0037) |
| French Final CPI m/m | 15-03-2024 | 13:15 | EUR | - | 0.008 |
| Italian Retail Sales m/m | 15-03-2024 | 15:30 | EUR | - | (0.001) |
| Italian Trade Balance | 15-03-2024 | 16:30 | EUR | - | - |
| Consumer Inflation Expectations | 15-03-2024 | 15:00 | GBP | - | 0.033 |
| Tertiary Industry Activity m/m | 15-03-2024 | 10:00 | JPY | - | 0.007 |
| BusinessNZ Manufacturing Index | 15-03-2024 | 03:00 | NZD | - | 47.3 |
| Industrial Production m/m | 15-03-2024 | 18:45 | USD | - | (0.001) |
| Prelim UoM Consumer Sentiment | 15-03-2024 | 19:30 | USD | - | 0.769 |

..... End of Report