



15 Apr.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,519	(1.0) %	0.3 %
BSE SENSEX	74,245	(1.1) %	0.3 %
CNX BANK	48,565	(0.9) %	2.1 %
CNX MIDCAP	50,068	(0.6) %	2.4 %
CNX SMALLCAP	16,496	(0.5) %	4.6 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	37,983	(1.2) %	0.7 %
S&P 500	5,123	(1.5) %	8.0 %
FTSE 100	7,996	0.9 %	3.5 %
HANG SENG	16,722	(2.2) %	(0.4) %
NIKKEI	39,524	0.2 %	18.7 %
SHANGHAI COMPOSITE	3,019	(0.5) %	1.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.36	0.1 %	0.4 %
EUR/USD	1.07	(0.7) %	(2.8) %
GBP/USD	1.25	(0.6) %	(1.5) %
USD/JPY	153.10	0.5 %	8.5 %
USD/AUD	1.53	0.7 %	4.3 %
USD/SGD	1.35	0.3 %	2.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	86	0.5 %	21.7 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,345	(1.8) %	12.8 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,443	1.3 %	4.6 %
Copper(USD/MT)	9,402	1.7 %	11.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.5	(0.1) %	0.6 %

Global Economy: Consumer sentiment in the U.S. has deteriorated by more than expected in the month of April, according to preliminary data released by the University of Michigan on Friday. The University of Michigan said its consumer sentiment fell to 77.9 in April from 79.4 in March. The report also said year-ahead inflation expectations rose to 3.1 percent in April from 2.9 percent in March, climbing just above the 2.3-3.0 percent range seen in the two years prior to the pandemic. Import prices in the U.S. increased by 0.4 percent in March after rising by 0.3 percent in February, according to a report released by the Labor Department. Meanwhile, the Labor Department said export prices rose by 0.3 percent in March after climbing by a revised 0.7 percent in February. The UK economy expanded for the second straight month in February suggesting that it is set to move out of a technical recession, thanks to the rebound in manufacturing output. Real gross domestic product edged up 0.1 percent on a monthly basis in February, the Office for National Statistics said. Industrial production was the largest contributor to the growth in February, which climbed 1.1 percent. Another report from the ONS showed that the visible trade deficit widened moderately to GBP 14.2 billion in February from GBP 14.1 billion in January. The value of core machine orders in Japan jumped by a seasonally adjusted 7.7 percent on month in February, the Cabinet Office reported - coming in at 886.6 billion yen.

Global Indices: The Dow shed nearly 2.5 percent in the week, while the S&P 500 and the Nasdaq dropped by about 1.6 percent and 0.5 percent, respectively.

Indian Economy: India's consumer price inflation (CPI) came in at 4.85% in March on year ago, easing from 5.09% in the previous month, according to latest official data. The consumer food price index or CFPI based inflation stood at 8.52% in March compared to 8.66% in February. India's industrial production rose by 5.7% on year in February 2024. This is the best reading after last October's 11.60% jump.

Equity Market: The barometer index, the S&P BSE Sensex, was dropped 793.25 points or 1.06% to 74,244.90. The Nifty 50 index fell 234.40 points or 1.03% to 22,519.40.

Corporate News: Tata Consultancy Services has recorded 9.1 percent on-year growth in net profit at Rs 12,434 crore for the quarter ended March FY24, beating analysts' estimates. Revenue from operations grew by 3.5 percent YoY to Rs 61,237 crore, driven by India, the UK, and the manufacturing segment, while the constant currency revenue growth was 2.2 percent. Anand Rathi Wealth has recorded nearly 33 percent year-on-year growth in net profit at Rs 56.6 crore for the quarter ended March FY24, despite weak operating margin performance. Revenue from operations for the quarter grew by 29 percent to Rs 184.3 crore compared to the same period last year.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	388.2	220.0	220.0
MF(INR cr)	2,361.2	278.8	278.8

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	122,996	107,142	107,142
F&O(INR cr)	13,584,290	36,043,543	36,043,543

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.3	15.3	15.3
NSE VIX	11.5	11.5	11.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	48,565	(0.9) %	2.1 %	Energy	39,756	(0.9) %	0.7 %
IT	35,018	(0.8) %	(0.1) %	Pharma	18,789	(1.7) %	(2.2) %
Metals	8,951	(0.5) %	4.5 %	Finance	21,522	(0.9) %	1.5 %
Auto	21,851	(0.6) %	2.2 %	PSU	7,199	(1.3) %	1.2 %
FMCG	53,701	(1.1) %	(0.3) %	Real Estate	952	(0.9) %	1.3 %

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>
I R C T C	1,058	3.4 %	9.0 %	Sun Pharma	1,540	(4.0) %	(5.5) %
Vedanta	373	3.1 %	29.7 %	Adani Powe	595	(3.7) %	6.2 %
Bharat Ele	234	2.1 %	10.6 %	Maruti Suz	12,267	(3.3) %	(2.4) %
Hind.Aeron	3,638	2.0 %	6.9 %	Zydus Life	962	(3.2) %	(3.8) %
A B B	6,753	1.7 %	3.8 %	Interglobe	3,693	(2.7) %	4.1 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Housing Starts	15-04-2024	17:45	CAD	-	-
Manufacturing Sales m/m	15-04-2024	18:00	CAD	-	0.002
PPI m/m	15-04-2024	12:00	CHF	-	0.001
Industrial Production m/m	15-04-2024	14:30	EUR	-	(0.032)
MPC Member Breeden Speaks	15-04-2024	16:45	GBP	-	-
Core Machinery Orders m/m	15-04-2024	05:20	JPY	-	(0.017)
BusinessNZ Services Index	15-04-2024	04:00	NZD	-	53
Visitor Arrivals m/m	15-04-2024	04:15	NZD	-	0.082
Business Inventories m/m	15-04-2024	19:30	USD	-	0

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