



16 Apr.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,273	(1.1) %	(0.8) %
BSE SENSEX	73,400	(1.1) %	(0.8) %
CNX BANK	47,773	(1.6) %	0.4 %
CNX MIDCAP	49,281	(1.6) %	0.8 %
CNX SMALLCAP	16,211	(1.7) %	2.8 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	37,735	(0.7) %	0.1 %
S&P 500	5,062	(1.2) %	6.7 %
FTSE 100	7,966	(0.4) %	3.2 %
HANG SENG	16,600	(0.7) %	(1.1) %
NIKKEI	39,233	(0.7) %	17.9 %
SHANGHAI COMPOSITE	3,057	1.3 %	3.2 %

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: The Commerce Department released a report on Monday showing U.S. retail sales increased by 0.7 percent in March after advancing by an upwardly revised 0.9 percent in February. The report also said core retail sales jumped by 1.1 percent in March after rising by 0.3 percent in February. Business inventories in the U.S. increased by 0.4 percent in February after coming in unchanged in January, the Commerce Department reported. Eurozone industrial production recovered in February driven by the rebound in capital and durable consumer goods output, official data revealed on Monday. Industrial production grew 0.8 percent on a monthly basis in February, Eurostat reported. Overall production expanded despite a decline in energy output, which was down 3.0 percent. Data showed that industrial production decreased 6.4 percent year-on-year in February after easing 6.6 percent in January. In the EU27, industrial production expanded 0.7 percent on month in February, but decreased 5.4 percent from the same period last year. China's gross domestic product gained 5.3 percent on year in the first quarter of 2024, the National Bureau of Statistics reported. On a seasonally adjusted quarterly basis, GDP was up 1.6 percent. The bureau also said that industrial production rose 4.5 percent on year in March. Retail sales were up 3.1 percent in March, down from 5.5 percent in the previous month. China's unemployment rate came in at 5.2 percent, down from 5.3 percent in the previous month.

Global Indices: The Nasdaq plunged 290.08 points or 1.8 percent to 15,885.02, the S&P 500 tumbled 61.59 points or 1.2 percent to 5,061.82 and the Dow slid 248.13 points or 0.7 percent to 37,735.11.

Indian Economy: India's combined exports in March 2024 are estimated at \$70.21 billion showing a decrease of 3.01% compared to March 2023. Conversely, overall imports in March 2024 are estimated at \$73.12 billion, reflecting a decline of 6.11% year-on-year. The overall trade deficit is estimated at \$78.12 billion, reflecting a significant decline of 35.77% compared to the deficit of \$121.62 billion recorded in FY 2022-23. India's wholesale inflation rate quickened to three-month high of 0.53% in February, mainly driven by food and primary articles, data released by the commerce ministry on April 15 showed. Wholesale Price Index (WPI) inflation stood at 0.2% in February and 1.34% in March 2023.

Equity Market: The barometer index, the S&P BSE Sensex slipped 845.12 points or 1.14% to 73,399.78. The Nifty 50 index lost 246.90 points or 1.10% to 22,272.50.

Corporate News: Jio Financial Services has signed an agreement with BlackRock Inc and BlackRock Advisors Singapore Pte Ltd to form a 50/50 joint venture for setting up wealth management and broking businesses in India. The launch of the wealth management and broking business is subject to regulatory and statutory approvals. InterGlobe Aviation's IndiGo's market share increased to 60.5 percent in March 2024, up from 60.1 percent in February. In terms of on-time performance (OTP), IndiGo was in third place with 81.3 percent.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(952.1)	52.5	52.5
MF(INR cr)	465.8	302.2	302.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	122,403	108,668	108,668
F&O(INR cr)	26,582,689	35,097,458	35,097,458

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.3	15.3	15.3
NSE VIX	12.5	11.6	11.6

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	47,773	(1.6) %	0.4 %	Energy	39,629	(0.3) %	0.4 %
IT	34,464	(1.6) %	(1.7) %	Pharma	18,618	(0.9) %	(3.1) %
Metals	8,900	(0.6) %	3.9 %	Finance	21,146	(1.7) %	(0.2) %
Auto	21,680	(0.8) %	1.4 %	PSU	7,056	(2.0) %	(0.8) %
FMCG	53,175	(1.0) %	(1.3) %	Real Estate	942	(1.1) %	0.2 %

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>
ONGC	280	5.3 %	3.7 %	Jio Financ	354	(4.8) %	(0.7) %
Hindalco I	613	2.3 %	7.8 %	Adani Gree	1,815	(3.7) %	(3.9) %
GAIL (Indi	204	1.3 %	11.7 %	IRFC	140	(3.5) %	(3.1) %
Maruti Suz	12,423	1.3 %	(1.2) %	Pidilite I	2,883	(3.4) %	(5.5) %
Nestle Ind	2,554	0.7 %	(1.2) %	United Spi	1,149	(2.9) %	(0.8) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
CB Leading Index m/m	16-04-2024	20:00	AUD	-	0.002
CPI m/m	16-04-2024	18:00	CAD	-	0.003
New Home Prices m/m	16-04-2024	07:00	CNY	-	(0.0036)
Industrial Production y/y	16-04-2024	07:30	CNY	-	0.07
Italian Trade Balance	16-04-2024	14:30	EUR	-	-
Claimant Count Change	16-04-2024	11:30	GBP	-	-
CB Leading Index m/m	16-04-2024	19:00	GBP	-	(0.003)
BOE Gov Bailey Speaks	16-04-2024	22:30	GBP	-	-
FOMC Member Daly Speaks	16-04-2024	05:30	USD	-	-
FOMC Member Jefferson Speaks	16-04-2024	18:30	USD	-	-
Industrial Production m/m	16-04-2024	18:45	USD	-	0.001

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