



18 Mar.2024

## INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D    | % YTD  |
|----------------|--------|---------|--------|
| CNX NIFTY      | 21,990 | (0.2) % | 26.4 % |
| BSE SENSEX     | 72,643 | (0.6) % | 22.9 % |
| CNX BANK       | 46,459 | (0.3) % | 13.8 % |
| CNX MIDCAP     | 46,669 | (0.0) % | 54.7 % |
| CNX SMALLCAP   | 14,858 | 0.1 %   | 64.0 % |

| GLOBAL INDICES     | LATEST | % 1D    | % YTD   |
|--------------------|--------|---------|---------|
| DOW JONES          | 38,715 | (0.5) % | 2.7 %   |
| S&P 500            | 5,117  | (0.7) % | 7.9 %   |
| FTSE 100           | 7,727  | (0.2) % | 0.1 %   |
| HANG SENG          | 16,721 | (1.4) % | (0.4) % |
| NIKKEI             | 38,708 | (0.3) % | 16.3 %  |
| SHANGHAI COMPOSITE | 3,055  | 0.5 %   | 3.1 %   |

## FOREX RATES

|         | LATEST | % 1D    | % YTD   |
|---------|--------|---------|---------|
| USD/INR | 82.89  | 0.1 %   | (0.2) % |
| EUR/USD | 1.09   | (0.2) % | (1.1) % |
| GBP/USD | 1.28   | (0.1) % | 0.4 %   |
| USD/JPY | 148.00 | 0.2 %   | 4.9 %   |
| USD/AUD | 1.51   | 0.2 %   | 3.1 %   |
| USD/SGD | 1.33   | 0.1 %   | 1.1 %   |

## COMMODITIES

|                    | LATEST | % 1D    | % YTD   |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 81     | 1.9 %   | 15.5 %  |
| Gold(INR/10g)      | 51,317 | 0.1 %   | 6.6 %   |
| Gold Comex(USD/oz) | 2,156  | (0.3) % | 3.7 %   |
| SILVER(INR/1Kg)    | 66,740 | (0.3) % | 7.5 %   |
| Aluminium(USD/MT)  | 2,219  | 0.6 %   | (5.1) % |
| Copper(USD/MT)     | 8,907  | 1.3 %   | 5.7 %   |

## FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D  | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec India | 8.3    | (0.0) % | 0.1 %   |
| 10 Y GSec US 10 | 4.3    | 0.0 %   | 0.4 %   |

**Global Economy:** A report released by the Labor Department on Friday showed import prices in the U.S. increased in line with economist estimates in the month of February. The Labor Department said import prices rose by 0.3 percent in February after climbing by 0.8 percent in January. The report said export prices climbed by 0.8 percent in February following an upwardly revised 0.9 percent increase in January. With manufacturing and mining output recovering from weather-related declines in January, the Federal Reserve released a report on Friday showing a slight increase in U.S. industrial production in the month of February. The Fed said industrial production inched up by 0.1 percent in February after falling by a downwardly revised 0.5 percent in January. Preliminary data released by the University of Michigan on Friday unexpectedly showed a slight deterioration in U.S. consumer sentiment in the month of March. The report said the consumer sentiment index edged down to 76.5 in March after falling to 76.9 in February. China's value-added industrial output went up 7 percent during the January-February period of 2024, data from the National Bureau of Statistics (NBS) showed. On a monthly basis, industrial output edged up 0.56 percent in February from the previous month. China's retail sales of consumer goods climbed 5.5 percent year on year in the first two months of 2024, official data showed. The surveyed urban unemployment rate on average in China stood at 5.3 percent in the first two months of 2024. China's employment situation was generally stable during the period, according to the NBS.

**Global Indices:** For the week, the tech-heavy Nasdaq declined by 0.7 percent, while the S&P 500 edged down by 0.1 percent and the Dow was nearly unchanged.

**Indian Economy:** India's foreign exchange reserves increased for the third straight time in the week ended March 8. Reserves rose \$10.47 billion during the week, recording the highest weekly increase since July 2023, to touch a two-year high of \$636.1 billion, as per Reserve Bank of India data. Foreign currency assets increased by \$8.12 billion to \$562.4 billion. Gold reserves expanded by \$2.3 billion to \$50.72 billion, whereas SDRs were up by \$31 million to \$18.21 billion.

**Equity Market:** In the barometer index, the S&P BSE Sensex slipped 453.85 points or 0.62% to 72,643.43. The Nifty 50 index lost 123.30 points or 0.56% to 22,023.35.

**Corporate News:** Crompton Greaves Consumer Electricals has received a patent for its invention, the linear node tubular lighting system. This patent has been officially granted for 20 years, effective August 14, 2020. KPI Green Energy has emerged as the successful bidder in the Maharashtra State Power Generation Co. (MAHAGENCO) tender for the development of a 100 MWAC solar power project. It has received a letter of intent from MAHAGENCO for the said order.



## FUND FLOWS

|             | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (13.8)        | 489.7      | 111.6      |
| 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) | 158,100       | 90,860         | 85,147         |
| F&O(INR cr)  | 14,930,672    | 35,260,063     | 32,179,793     |

## MARKET VOLATILITY

|          | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 14.4          | 14.2           | 15.2           |
| NSE VIX  | 13.7          | 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  | 46,594        | (0.4) %     | 14.2 %       | Energy      | 37,583        | (1.5) %     | 64.8 %       |
| IT     | 37,501        | (0.5) %     | 31.0 %       | Pharma      | 18,718        | (0.9) %     | 55.1 %       |
| Metals | 7,803         | 0.0 %       | 42.4 %       | Finance     | 20,644        | (0.4) %     | 13.7 %       |
| Auto   | 20,192        | (1.6) %     | 62.5 %       | PSU         | 6,761         | (0.3) %     | 80.0 %       |
| FMCG   | 54,155        | 0.0 %       | 18.4 %       | Real Estate | 830           | (0.2) %     | 112.4 %      |

## 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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Zomato Ltd         | 160           | 4.8 %       | 208.1 %      | I O C L           | 161           | (5.5) %     | 107.7 %      |
| Ambuja Cem         | 601           | 3.1 %       | 60.3 %       | M & M             | 1,800         | (4.8) %     | 53.8 %       |
| UPL                | 475           | 2.8 %       | (34.9) %     | TVS Motor         | 2,066         | (3.9) %     | 90.5 %       |
| Bharti Air         | 1,220         | 2.1 %       | 60.4 %       | B P C L           | 586           | (3.7) %     | 77.7 %       |
| Vedanta            | 265           | 1.9 %       | (6.1) %      | Torrent Ph        | 2,594         | (3.6) %     | 67.9 %       |

## EVENTS CALENDAR

| <i>EVENT</i>              | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|---------------------------|-------------|------------------|---------------|---------------|-----------------------|
| IPPI m/m                  | 18-03-2024  | 18:00            | CAD           | -             | (0.001)               |
| Industrial Production y/y | 18-03-2024  | 07:30            | CNY           | -             | 0.068                 |
| Final Core CPI y/y        | 18-03-2024  | 15:30            | EUR           | -             | 0.031                 |
| Rightmove HPI m/m         | 18-03-2024  | 05:31            | GBP           | -             | 0.009                 |
| Core Machinery Orders m/m | 18-03-2024  | 05:20            | JPY           | -             | 0.027                 |
| BusinessNZ Services Index | 18-03-2024  | 03:00            | NZD           | -             | 52.1                  |
| NAHB Housing Market Index | 18-03-2024  | 19:30            | USD           | -             | 48                    |

..... End of Report .....