



19 Mar.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,056	0.1 %	26.8 %
BSE SENSEX	72,748	0.1 %	23.1 %
CNX BANK	46,576	(0.0) %	14.1 %
CNX MIDCAP	46,502	(0.4) %	54.1 %
CNX SMALLCAP	14,762	(0.6) %	62.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,790	0.2 %	2.9 %
S&P 500	5,149	0.6 %	8.6 %
FTSE 100	7,723	(0.1) %	0.0 %
HANG SENG	16,737	0.1 %	(0.3) %
NIKKEI	39,740	2.7 %	19.4 %
SHANGHAI COMPOSITE	3,085	1.0 %	4.1 %

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 National Association of Home Builders on Monday showed an unexpected improvement in U.S. homebuilder confidence in the month of March. The report said the NAHB/Wells Fargo Housing Market Index rose to 51 in March from 48 in February. Eurozone inflation softened as estimated in February largely reflecting the decline in energy prices, final data from Eurostat showed on Monday. The harmonized index of consumer prices, or HICP posted an annual increase of 2.6 percent after rising 2.8 percent in January. Core inflation slowed to 3.1 percent, as estimated, from 3.3 percent a month ago. On a monthly basis, the HICP gained 0.6 percent in February. The euro area trade surplus increased in January as exports increased amid falling imports, Eurostat reported. The trade surplus rose to a seasonally adjusted surplus of EUR 28.1 billion in January from EUR 14.3 billion in December. Exports increased 2.1 percent on month, while imports decreased 4.0 percent in January. On an unadjusted basis, the trade balance showed a surplus of EUR 11.4 billion in January compared to a shortfall of EUR 32.6 billion in the same period last year. Exports registered an increase of 1.3 percent. By contrast, imports logged a sharp decline of 16.1 percent.

Global Indices: With the upward move, the Nasdaq and the S&P 500 regained ground after closing lower for three straight sessions.

Indian Economy: The pan India retail sales rose 5% on year in February 2024, according to the survey by Retailers Association of India (RAI). The West and South Zones sales saw growth of 6% each while East and North zone retail sales rose 3% and 4% respectively. Apart from Consumer durables and electronics, which saw a decline of 3% on year, all other categories reported yoy sales growth. Sports goods reported strongest growth of 9% followed by footwear (8%) and QSR (7%) on yoy basis. In January 2024 also, the annual retail sales growth has been at 5% level.

Equity Market: The barometer index, the S&P BSE Sensex gained 104.99 points or 0.14% to 72,748.42. The Nifty 50 index rose 32.35 or 0.15% to 22,055.70.

Corporate News: Sonata Software has signed a joint go-to-market agreement with Zones, LLC, a global provider of end-to-end IT solutions and cloud-managed services. As part of the five-year partnership, they will support cost efficiency and data optimization through joint offerings and the delivery of industry-specific solutions. Veritas (India) in consortium with Genesys International Corporation has received a Letter of Acceptance from Brihanmumbai Municipal Corporation (BMC) for the project worth Rs 155.85 crore. The project includes the development, implementation, and maintenance of a 3D city model and change detection using geospatial technology for BMC.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	93.3	450.0	111.5
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)	5,133	83,716	84,812
F&O(INR cr)	27,575,226	34,619,660	32,160,527

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.4	14.2	15.2
NSE VIX	13.9	14.2	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	46,576	(0.0) %	14.1 %	Energy	37,825	0.6 %	65.9 %
IT	36,886	(1.6) %	28.8 %	Pharma	18,814	0.5 %	55.9 %
Metals	7,997	2.5 %	46.0 %	Finance	20,627	(0.1) %	13.6 %
Auto	20,447	1.3 %	64.5 %	PSU	6,783	0.3 %	80.6 %
FMCG	53,908	(0.5) %	17.9 %	Real Estate	834	0.5 %	113.4 %

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>
Tata Steel	150	5.6 %	43.8 %	Adani Tota	947	(4.2) %	12.1 %
Jindal Ste	808	5.2 %	48.5 %	Adani Ener	1,009	(3.5) %	6.9 %
P & G Hygi	16,420	4.2 %	17.0 %	Ambuja Cem	585	(2.7) %	56.0 %
Tata Power	393	3.2 %	102.5 %	Life Insur	904	(2.2) %	66.1 %
M & M	1,856	3.1 %	58.7 %	Tata Consu	1,187	(2.1) %	65.5 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Cash Rate	19-03-2024	09:00	AUD	-	0.0435
RBA Press Conference	19-03-2024	10:00	AUD	-	-
CPI m/m	19-03-2024	18:00	CAD	-	0
Trade Balance	19-03-2024	12:30	CHF	-	-
SECO Economic Forecasts	19-03-2024	13:30	CHF	-	-
German ZEW Economic Sentiment	19-03-2024	15:30	EUR	-	19.9

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