



19 Apr.2024

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	21,996	(0.7) %	(2.1) %
BSE SENSEX	72,489	(0.6) %	(2.1) %
CNX BANK	47,069	(0.9) %	(1.1) %
CNX MIDCAP	48,996	(0.5) %	0.2 %
CNX SMALLCAP	16,286	(0.3) %	3.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	37,775	0.1 %	0.2 %
S&P 500	5,011	(0.2) %	5.7 %
FTSE 100	7,877	0.4 %	2.0 %
HANG SENG	16,386	0.8 %	(2.4) %
NIKKEI	38,080	0.3 %	14.4 %
SHANGHAI COMPOSITE	3,074	0.1 %	3.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	83.59	0.1 %	0.7 %
EUR/USD	1.06	(0.2) %	(3.8) %
GBP/USD	1.24	(0.2) %	(2.3) %
USD/JPY	154.54	0.4 %	9.5 %
USD/AUD	1.56	0.9 %	6.1 %
USD/SGD	1.37	0.3 %	3.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	83	(3.1) %	17.5 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	2,375	(0.4) %	14.2 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,581	2.7 %	10.5 %
Copper(USD/MT)	9,434	0.6 %	11.9 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.6	(0.1) %	0.7 %

**Global Economy:** The Conference Board released a report on Thursday showing an unexpected pullback by its index of leading U.S. economic indicators in the month of March. The report said the leading economic index fell by 0.3 percent in March after rising by 0.2 percent in February. The modest advance in February marked the first increase by the leading index in two years. The report also said the coincident economic index rose by 0.3 percent in March after inching up by 0.1 percent in February. Meanwhile, the Conference Board said the lagging economic index came in unchanged in March after rising by 0.3 percent in February. The euro area current account surplus decreased to a 3-month low in February, the European Central Bank reported. The current account surplus dropped to EUR 29.0 billion in February from EUR 39.0 billion in January. The surplus on goods trade decreased to EUR 34 billion from EUR 48 billion. By contrast, the surplus on services rose to EUR 7.0 billion from EUR 4.0 billion. Japan's core inflation slowed in March fell below 3 per cent for the first time in over a year, data showed on Friday. The nationwide core consumer price index (CPI), rose 2.6 per cent in March from a year earlier. Meanwhile, a gauge of price gains that excludes fresh food and energy costs and is closely watched by the Bank of Japan moderated to 2.9 per cent after increasing 3.2 per cent in February.

**Global Indices:** Reflecting weakness in the tech sector, the Nasdaq slid 81.87 points or 0.5 percent to 15,601.50, while the S&P 500 dipped 11.09 points or 0.2 percent to 5,011.12. The narrower Dow bucked the downtrend, inching up 22.07 points or 0.1 percent to 37,775.38

**Indian Economy:** According to the latest data on the summary of Outward Foreign Direct Investment (OFDI) from the Reserve Bank of India (RBI), the total financial commitment from India stood at USD 3919.84 million in March 2024, up 6.75% compared to February 2024. On annual basis, it showed a massive jump of 48.68%.

**Equity Market:** The barometer index, the S&P BSE Sensex, was slipped 454.69 points or 0.62% to 72,488.99. The Nifty 50 index lost 152.05 points or 0.69% to 21,995.85.

**Corporate News:** Infosys recorded a consolidated profit of Rs 7,969 crore for the quarter ended March FY24, growing 30.5 percent over the previous quarter. Revenue from operations fell by 2.3 percent QoQ to Rs 37,923 crore, while revenue in dollar terms declined 2.1 percent and constant currency revenue dropped 2.2 on a sequential basis. Bajaj Auto has reported standalone net profit of Rs 1,936 crore for the March FY24 quarter, growing sharply by 35 percent over the year-ago period. Revenue from operations during the same period increased 29 percent to Rs 11,485 crore, with sales volume rising by 24 percent to 10.62 lakh units.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(391.0)	(45.6)	(45.6)
MF(INR cr)	4,079.4	1,179.9	1,179.9

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	125,886	109,525	109,525
F&O(INR cr)	53,289,763	38,074,833	38,074,833

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.2	16.1	16.1
NSE VIX	13.0	11.8	11.8

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	47,069	(0.9) %	(1.1) %	Energy	39,360	(0.9) %	(0.3) %
IT	33,499	(0.2) %	(4.4) %	Pharma	18,526	(0.9) %	(3.6) %
Metals	8,824	(0.3) %	3.1 %	Finance	20,899	(0.9) %	(1.4) %
Auto	21,521	(0.8) %	0.6 %	PSU	6,953	(0.2) %	(2.2) %
FMCG	52,826	(1.1) %	(2.0) %	Real Estate	933	(0.5) %	(0.8) %

### 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>
Jio Financ	378	4.6 %	6.0 %	A B B	6,370	(4.1) %	(2.1) %
Bharti Air	1,266	4.1 %	4.0 %	Apollo Hos	6,074	(4.1) %	(5.9) %
ICICI Lomb	1,710	3.7 %	0.7 %	Titan Comp	3,525	(3.3) %	(5.7) %
Vedanta	389	2.7 %	35.1 %	Nestle Ind	2,463	(3.3) %	(4.8) %
Trent	4,087	2.5 %	5.2 %	Coal India	439	(3.2) %	(0.8) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
German PPI m/m	19-04-2024	11:30	EUR	-	(0.004)
MPC Member Breeden Speaks	19-04-2024	19:45	GBP	-	-
National Core CPI y/y	19-04-2024	05:00	JPY	-	0.028
FOMC Member Bostic Speaks	19-04-2024	03:15	USD	-	-

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