



23 Apr.2024

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,336	0.9 %	(0.6) %
BSE SENSEX	73,649	0.8 %	(0.5) %
CNX BANK	47,925	0.7 %	0.7 %
CNX MIDCAP	49,096	0.8 %	0.4 %
CNX SMALLCAP	16,484	1.3 %	4.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,240	0.7 %	1.4 %
S&P 500	5,011	0.9 %	5.6 %
FTSE 100	8,024	1.6 %	3.9 %
HANG SENG	16,512	1.8 %	(1.6) %
NIKKEI	37,439	1.0 %	12.5 %
SHANGHAI COMPOSITE	3,045	(0.7) %	2.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	83.55	(0.1) %	0.6 %
EUR/USD	1.07	0.2 %	(3.4) %
GBP/USD	1.25	0.1 %	(2.2) %
USD/JPY	154.45	(0.1) %	9.5 %
USD/AUD	1.55	(0.2) %	5.7 %
USD/SGD	1.36	(0.1) %	3.1 %

**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)	2,391	(0.0) %	15.0 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,646	1.8 %	13.2 %
Copper(USD/MT)	9,749	1.4 %	15.6 %

**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	0.0 %	0.7 %

**Global Economy:** The government deficit to GDP ratio in the euro area dropped slightly in 2023, data from Eurostat showed on Monday. The government deficit to GDP came in at 3.6 percent in 2023, which was down from 3.7 percent in 2022. However, it remained above the 3.0 percent threshold. Further, data showed that the government debt to GDP dropped to 88.6 percent at the end of 2023 from 90.8 percent in 2022. Japan's PMI Manufacturing rises from 48.2 to 49.9 in April, above expectation of 48.0, signaling a near-stabilization of manufacturing business conditions. PMI Services rises from 54.1 to 54.6, highest since May 2023. PMI Composite also rose from 51.7 to 52.6, matching the joint-fastest pace set in nearly a year. The Judo Bank Flash Australia Services PMI Business Activity Index posted 54.2 in April, down from 54.4 in March. This marked a third successive monthly expansion, at a slower but still solid pace. The Judo Bank Flash Australia Manufacturing PMI rose to 49.9 in April, up from 47.3 in March. The Judo Bank Flash Australia Composite PMI Output Index posted 53.6 in April, up from 53.3 in March. The latest reading signaled that private sector activity expanded for a third straight month and at the quickest pace since April 2022.

**Global Indices:** The Dow ended with a gain of 253.78 points or 0.67 percent at 38,239.98, more than 200 points off the day's high of 38,447.16. The S&P 500, which climbed to 5,038.84, settled at 5,010.60, gaining 43.37 points or 0.87 percent, while the Nasdaq ended higher by 169.30 points or 1.11 percent at 15,451.31, off the day's high of 15,539.00.

**Indian Economy:** EPFO's latest provisional payroll data highlights that EPFO has added 15.48 lakh net members in the month of February, 2024. The data indicates that around 7.78 lakh new members have been enrolled during February, 2024. A noticeable aspect of the data is the dominance of the 18-25 age groups, constituting a significant 56.36% of the total new members added in February 2024 indicating the majority of individuals joining the organized workforce are youth, primarily first-time job seekers.

**Equity Market:** The barometer index, the S&P BSE Sensex jumped 560.29 points or 0.77% to 73,648.62. The Nifty 50 index gained 189.40 points or 0.86% to 22,336.40.

**Corporate News:** Reliance Industries recorded a net profit of Rs 21,243 crore for the March FY24 quarter, growing 0.1 percent Y-o-Y, dented by higher tax costs. Gross revenue for the quarter at Rs 2,64,834 crore jumped 10.8 percent on-year, supported by double-digit growth in oil-to-chemical (O2C) and consumer business. Hatsun Agro Product has reported a massive 109 percent on-year growth in net profit at Rs 52.2 crore for the March FY24 quarter, driven by strong operating performance. Revenue from operations for the quarter grew by 14.4 percent to Rs 2,047 crore compared to the same period last fiscal.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	92.5	(74.2)	(74.2)
MF(INR cr)	1,332.7	1,217.7	1,217.7

## MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	6,980	102,120	102,120
F&O(INR cr)	22,322,646	35,222,751	35,222,751

## MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.7	16.4	16.4
NSE VIX	12.7	12.0	12.0

## NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	47,925	0.7 %	0.7 %	Energy	39,570	0.5 %	0.2 %
IT	33,539	0.5 %	(4.3) %	Pharma	18,643	1.3 %	(2.9) %
Metals	8,931	0.2 %	4.3 %	Finance	21,327	0.7 %	0.6 %
Auto	21,813	0.9 %	2.0 %	PSU	7,146	3.1 %	0.5 %
FMCG	53,499	0.8 %	(0.7) %	Real Estate	933	0.7 %	(0.7) %

## 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>
Interglobe	3,727	4.7 %	5.0 %	NTPC	343	(2.2) %	0.2 %
Zydus Life	960	4.1 %	(4.0) %	Bosch	29,142	(2.2) %	(3.8) %
Punjab Nat	133	3.8 %	6.0 %	GAIL (Indi	199	(1.6) %	9.0 %
A B B	6,525	3.7 %	0.3 %	ICICI Pru	580	(1.3) %	(5.8) %
Canara Ban	600	3.6 %	1.8 %	Vedanta	381	(1.3) %	32.5 %

## EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
French Flash Manufacturing PMI	23-04-2024	12:45	EUR	-	46.2
German Flash Manufacturing PMI	23-04-2024	13:00	EUR	-	41.9
Flash Manufacturing PMI	23-04-2024	13:30	EUR	-	46.1
German Buba President Nagel Speaks	23-04-2024	18:00	EUR	-	-
Public Sector Net Borrowing	23-04-2024	11:30	GBP	-	-
Flash Manufacturing PMI	23-04-2024	14:00	GBP	-	50.3
MPC Member Pill Speaks	23-04-2024	16:45	GBP	-	-
Flash Manufacturing PMI	23-04-2024	06:00	JPY	-	48.2
Flash Manufacturing PMI	23-04-2024	19:15	USD	-	51.9
New Home Sales	23-04-2024	19:30	USD	-	-

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