



24 Jan.2023

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| CNX NIFTY | 18,119 | 0.5 % | 2.5 % |
| BSE SENSEX | 60,942 | 0.5 % | 2.8 % |
| CNX BANK | 42,821 | 0.7 % | 15.3 % |
| CNX MIDCAP | 31,274 | 0.6 % | 3.8 % |
| CNX SMALLCAP | 9,567 | (0.0) % | (9.8) % |
| GLOBAL INDICES | LATEST | % 1D | % YTD |
| DOW JONES | 33,630 | 0.8 % | 1.5 % |
| S&P 500 | 4,020 | 1.2 % | 5.1 % |
| FTSE 100 | 7,785 | 0.2 % | 3.1 % |
| HANG SENG | 22,045 | 1.8 % | 9.4 % |
| NIKKEI | 26,906 | 1.3 % | 4.6 % |
| SHANGHAI COMPOSITE | 3,265 | 0.8 % | 4.8 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 80.97 | (0.6) % | (2.1) % |
| EUR/USD | 1.09 | 0.4 % | 1.5 % |
| GBP/USD | 1.24 | 0.5 % | 2.5 % |
| USD/JPY | 129.60 | 0.2 % | (1.2) % |
| USD/AUD | 1.44 | 0.3 % | (2.2) % |
| USD/SGD | 1.32 | 0.0 % | (1.6) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| WTI Crude(USD/bbl) | 82 | 1.6 % | 6.1 % |
| Gold(INR/10g) | 51,317 | 0.1 % | 6.6 % |
| Gold Comex(USD/oz) | 1,911 | 0.1 % | 3.9 % |
| SILVER(INR/1Kg) | 66,740 | (0.3) % | 7.5 % |
| Aluminium(USD/MT) | 2,586 | 1.8 % | 10.6 % |
| Copper(USD/MT) | 9,232 | 0.5 % | 10.0 % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 3.5 | 0.1 % | (0.4) % |

Global Economy: Continuing to signal a near-term recession for the U.S. economy, the Conference Board released a report showing another sharp drop by its reading on leading U.S. economic indicators in the month of December. The Conference Board said its leading economic index dove by 1.0 percent in December after tumbling by a revised 1.1 percent in November. Meanwhile, the report said the coincident economic index inched up by 0.1 percent in December after coming in unchanged in November. The lagging economic index also increased by 0.3 percent in December after edging up by 0.2 percent in the previous month. Consumer confidence in the Eurozone continued to recover at the start of the year, reaching its highest level in nearly a year, according to preliminary figures released by the European Commission. The flash consumer confidence index rose 1.1 points to -20.9 in January. This was the highest reading since February 2022, when the score was -9.7. The corresponding reading for the EU rose 1.4 points to -22.4. The manufacturing sector in Australia slipped into contraction territory in January, the latest survey from Judo Bank revealed on Tuesday with a 32-month low manufacturing PMI score of 49.8. That's down from 50.2 in December and it falls beneath the boom-or-bust line of 50 that separates expansion from contraction. The survey also showed that Australia's services PMI improved to a three-month high of 48.3, up from 47.3 in December. The composite index also hit a three-month high by improving to 48.2 from 47.5.

Global Indices: While the Nasdaq soared 223.98 points or 2.0 percent to 11,364.41, the S&P 500 jumped 47.20 points or 1.2 percent to 4,019.81 and the Dow climbed 254.07 points or 0.8 percent to 33,625.56.

Indian Economy: According to the data released by the finance ministry, the Atal Pension Yojana (APY), which is focused towards unorganized sector workers, witnessed the highest-ever enrolments in 2022 with a 36% growth. The figure crossed 10 million for the first time in a calendar year. The number of enrolments in 2022 rose to 12.5 million from 9.2 million in 2021. An increase of 81% was recorded in 2022 as compared to the pre-pandemic year of 2019 when 6.9 million subscribers had enrolled in the pension scheme.

Equity Market: The barometer index S&P BSE Sensex advanced 319.90 points or 0.53% to 60,941.67. The Nifty 50 index added 90.90 points or 0.50% to 18,118.55.

Corporate News: Axis Bank's net profit surged 61.94% to Rs 5,853.07 crore on 27.44% increase in total income to Rs 26,891.87 crore in Q3 FY23 over Q3 FY22. On a consolidated basis, Poonawalla Fincorp reported 44.2% rise in net interest income to Rs 482 crore on 89.1% rise in profit after tax to Rs 182 crore in Q3 FY23 over Q3 FY22.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (202.0) | (108.1) | (25.8) |
| MF(INR cr) | 529.0 | 204.7 | 625.9 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 2,726 | 39,185 | 50,623 |
| F&O(INR cr) | 12,082,884 | 20,154,215 | 13,886,700 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 19.9 | 20.6 | 25.3 |
| NSE VIX | 13.6 | 14.7 | 18.2 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 42,821 | 0.7 % | 15.3 % | Energy | 26,137 | 0.0 % | (1.2) % |
| IT | 30,086 | 1.9 % | (17.2) % | Pharma | 12,718 | 0.9 % | (6.3) % |
| Metals | 6,778 | (0.4) % | 4.6 % | Finance | 18,888 | 0.6 % | 8.1 % |
| Auto | 12,797 | 0.8 % | 19.9 % | PSU | 4,248 | 0.4 % | 49.9 % |
| FMCG | 44,262 | 0.8 % | 20.6 % | Real Estate | 425 | (0.6) % | (10.5) % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Bandhan Ba | 248 | 4.6 % | (22.6) % | Shree Ceme | 23,037 | (5.7) % | (6.4) % |
| Havells In | 1,200 | 4.0 % | 2.3 % | UltraTech | 6,850 | (4.6) % | 2.7 % |
| Bajaj Hold | 5,787 | 3.7 % | 7.2 % | P I Indust | 3,129 | (3.4) % | 9.5 % |
| GAIL (Indi | 102 | 3.3 % | (5.4) % | Ambuja Cem | 501 | (3.2) % | 64.3 % |
| LTI Mindtr | 4,369 | 2.4 % | (29.2) % | Avenue Sup | 3,434 | (2.3) % | (15.9) % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|-----------------------------------|-------------|------------------|---------------|---------------|-----------------------|
| Flash Manufacturing PMI | 24-01-2023 | 03:30 | AUD | - | 50.2 |
| NAB Business Confidence | 24-01-2023 | 06:00 | AUD | - | (4) |
| Trade Balance | 24-01-2023 | 12:30 | CHF | - | - |
| Gov Board Member Schlegel Speaks | 24-01-2023 | 22:00 | CHF | - | - |
| French Flash Manufacturing PMI | 24-01-2023 | 13:45 | EUR | - | 49.2 |
| German Flash Manufacturing PMI | 24-01-2023 | 14:00 | EUR | - | 47.1 |
| Flash Manufacturing PMI | 24-01-2023 | 14:30 | EUR | - | 47.8 |
| Flash Manufacturing PMI | 24-01-2023 | 15:00 | GBP | - | 45.3 |
| CBI Industrial Order Expectations | 24-01-2023 | 16:30 | GBP | - | (6) |
| BOJ Core CPI y/y | 24-01-2023 | 10:30 | JPY | - | 0.029 |
| BusinessNZ Services Index | 24-01-2023 | 03:00 | NZD | - | 53.7 |
| Flash Services PMI | 24-01-2023 | 20:15 | USD | - | 44.7 |
| Richmond Manufacturing Index | 24-01-2023 | 20:30 | USD | - | 1 |

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