



24 Apr.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,368	0.1 %	(0.4) %
BSE SENSEX	73,738	0.1 %	(0.4) %
CNX BANK	47,970	0.1 %	0.8 %
CNX MIDCAP	49,615	1.1 %	1.4 %
CNX SMALLCAP	16,687	1.2 %	5.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,504	0.7 %	2.1 %
S&P 500	5,071	1.2 %	6.9 %
FTSE 100	8,045	0.3 %	4.2 %
HANG SENG	16,829	1.9 %	0.2 %
NIKKEI	37,552	0.3 %	12.8 %
SHANGHAI COMPOSITE	3,022	(0.7) %	2.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.42	(0.2) %	0.5 %
EUR/USD	1.07	(0.1) %	(3.5) %
GBP/USD	1.24	(0.7) %	(2.8) %
USD/JPY	154.65	0.1 %	9.6 %
USD/AUD	1.56	0.3 %	6.1 %
USD/SGD	1.36	0.1 %	3.2 %

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)	2,306	(3.5) %	10.9 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,654	0.3 %	13.6 %
Copper(USD/MT)	9,814	0.7 %	16.4 %

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 headline S&P Global Flash US PMI Composite Output Index dropped to 50.9 in April from 52.1 in March. Although continuing to signal an increase in business activity during the month, the latest data indicated only a slight expansion. Nevertheless, output has now risen for 15 consecutive months. The S&P Global Flash US Manufacturing PMI posted 49.9 in April to signal broadly unchanged business conditions over the course of the month. The index was down from 51.9 in March and ended a three-month sequence of improving operating conditions. The euro area private sector expanded the most in nearly a year in April as the continuing downturn in the manufacturing activity was offset the strength in the service sector, flash survey results from S&P Global showed on Tuesday. The composite output index registered 51.4 in April, up from 50.3 in March. Service sector output expanded for a third consecutive month with the pace of expansion strongest since eleven months, while manufacturing output shrank for a thirteenth straight month. Germany's private sector expanded for the first time in ten months in April driven by a solid rise in services activity, survey results from S&P Global showed on Tuesday. The flash composite output index rose more-than-expected to 50.5 in April from 47.7 in the previous month. Producer prices in Japan were up 2.3 percent on year in March, the Bank of Japan said on Wednesday. Consumer prices in Australia were up a seasonally adjusted 1.0 percent on quarter in the first quarter of 2024, the Australian Bureau of Statistics said on Wednesday.

Global Indices: The Dow settled with a gain of 263.71 points or 0.69 percent at 38,503.69. The S&P 500 climbed 59.95 points or 1.2 percent to 5,070.55, while the Nasdaq gained 245.33 points or 1.59 percent to settle at 15,696.64.

Indian Economy: The headline HSBC Flash India Composite PMI Output Index - a seasonally adjusted index that measures the month-on-month change in the combined output of India's manufacturing and service sectors - rose to 62.2 in April from 61.8 in March. This indicates the fastest rate of increase in aggregate business activity since mid-2010. Survey participants overwhelmingly attributed the expansion to buoyant demand from domestic and external clients. Growth in India remained broad-based across the manufacturing and service sectors.

Equity Market: The barometer index, the S&P BSE Sensex rose 89.83 points or 0.12% to 73,738.45. The Nifty 50 index added 31.60 points or 0.14% to 22,368.00.

Corporate News: Tata Consumer Products recorded consolidated net profit at Rs 268 crore for the quarter ended March FY24, declining sharply by 23 percent compared to the same period last fiscal despite healthy operating numbers, and topline, impacted by an exceptional loss of Rs 216 crore. Revenue from operations grew by 9 percent year over year to Rs 3,927 crore for the quarter. NHPC has signed a supplementary joint venture agreement with JV partners for the sale of a partial stake in the National High Power Test Laboratory (NHPTL). The joint venture partners are NHPC, NTPC, Power Grid Corporation of India, DVC, CPRI, and NHPTL. NHPC holds a 20 percent stake in NHPTL.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(314.0)	(94.2)	(94.2)
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)	113,139	102,855	102,855
F&O(INR cr)	34,056,107	35,144,975	35,144,975

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.9	16.4	16.4
NSE VIX	10.2	11.9	11.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	47,970	0.1 %	0.8 %	Energy	39,447	(0.3) %	(0.1) %
IT	33,715	0.5 %	(3.8) %	Pharma	18,464	(1.0) %	(3.9) %
Metals	8,900	(0.3) %	3.9 %	Finance	21,334	0.0 %	0.6 %
Auto	21,914	0.5 %	2.5 %	PSU	7,150	0.1 %	0.5 %
FMCG	53,905	0.8 %	0.0 %	Real Estate	957	2.6 %	1.8 %

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>
Grasim Ind	2,370	3.9 %	3.4 %	Sun Pharma	1,485	(3.6) %	(8.9) %
Bharti Air	1,342	3.5 %	10.3 %	A B B	6,307	(3.3) %	(3.0) %
Ambuja Cem	637	3.3 %	2.4 %	Zomato Ltd	187	(3.1) %	1.6 %
I R F C	148	2.5 %	2.0 %	B P C L	593	(1.7) %	(1.3) %
Tata Motor	661	2.4 %	0.3 %	I O C L	168	(1.6) %	(0.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
CPI q/q	24-04-2024	07:00	AUD	-	0.006
Core Retail Sales m/m	24-04-2024	18:00	CAD	-	0.005
BOC Summary of Deliberations	24-04-2024	23:00	CAD	-	-
Credit Suisse Economic Expectations	24-04-2024	13:30	CHF	-	11.5
CB Leading Index m/m	24-04-2024	18:30	CNY	-	(0.001)
German Buba President Nagel Speaks	24-04-2024	12:30	EUR	-	-
SPPI y/y	24-04-2024	05:20	JPY	-	0.021
Trade Balance	24-04-2024	04:15	NZD	-	-
Crude Oil Inventories	24-04-2024	20:00	USD	-	-

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