



25 Apr.2024

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,402	0.2 %	(0.3) %
BSE SENSEX	73,853	0.2 %	(0.2) %
CNX BANK	48,189	0.5 %	1.3 %
CNX MIDCAP	49,992	0.8 %	2.2 %
CNX SMALLCAP	16,747	0.4 %	6.2 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,461	(0.1) %	2.0 %
S&P 500	5,072	0.0 %	6.9 %
FTSE 100	8,040	(0.1) %	4.1 %
HANG SENG	17,201	2.2 %	2.5 %
NIKKEI	38,460	2.4 %	15.5 %
SHANGHAI COMPOSITE	3,045	0.8 %	2.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	83.39	(0.0) %	0.4 %
EUR/USD	1.07	(0.0) %	(3.5) %
GBP/USD	1.24	(0.1) %	(3.0) %
USD/JPY	154.75	0.1 %	9.7 %
USD/AUD	1.55	(0.4) %	5.7 %
USD/SGD	1.36	0.0 %	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)	2,324	0.8 %	11.8 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,585	(2.6) %	10.6 %
Copper(USD/MT)	9,599	(2.2) %	13.9 %

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	(0.0) %	0.7 %

Global Economy: With orders for transportation equipment showing a substantial increase, the Commerce Department released a report on Wednesday showing new orders for U.S. manufactured durable goods surged by more than expected in the month of March. The report said durable goods orders soared by 2.6 percent in March after climbing by a downwardly revised 0.7 percent in February. Germany's business sentiment strengthened for the third straight month to a near one-year high in April on a notable improvement in confidence among service providers. The business confidence index climbed to 89.4 in April from a revised 87.9 in March, monthly survey results from the Ifo Institute showed on Wednesday. The Conference Board Leading Economic Index (LEI) for China fell by 0.2 percent in March 2024 to 151.5, following a downwardly revised 0.3 percent decrease in February. The Conference Board Coincident Economic Index (CEI) for China also dropped significantly by 1.7 percent in March 2024 to 146.4, more than reversing a 0.7 percent increase in February. Confidence among British manufacturers improved in April and their output expectations hit the strongest in six months, the latest quarterly Industrial Trends Survey results from the Confederation of British Industry showed on Wednesday. The business sentiment indicator rose to +9 percent in the quarter to April from -3 percent in January.

Global Indices: The Dow edged down 42.77 points or 0.1 percent to 38,460.92, the S&P 500 crept up 1.08 points or less than a tenth of a percent to 5,071.63 and the Nasdaq inched up 16.11 points or 0.1 percent to 15,712.75.

Indian Economy: Reserve Bank of India (RBI) has stated in a latest monthly update that an analysis of the long-term trend and cyclical components of India's services export growth shows a moderately increasing trend in services export growth since 2016. An analysis of India's revealed comparative advantage in services exports indicates that it has an edge in telecom and IT services. The significant growth in India's software and business services exports in the recent years is a reflection of the expansion of global capability centres (GCCs) in India and the rise in digital delivery of services.

Equity Market: The barometer index, the S&P BSE Sensex, was up 114.49 points or 0.16% to 73,852.94. The Nifty 50 index added 34.40 points or 0.15% to 22,402.40.

Corporate News: Hindustan Unilever has recorded standalone net profit at Rs 2,406 crore for the quarter ended March FY24, falling 5.7 percent over the year-ago period, impacted by weak topline as well as operating numbers. Revenue from operations fell 0.2 percent on-year to Rs 14,857 crore for the quarter, with volume growth of 2 percent. Axis Bank has reported standalone net profit of Rs 7,130 crore for the March FY24 quarter, against a loss of Rs 5,728.4 crore in the corresponding period of the last fiscal, despite elevated provisions for bad loans. Net interest income grew by 11.5 percent year-on-year to Rs 13,089 crore for the quarter, with a net interest margin of 4.06 percent.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(414.8)	(118.9)	(118.9)
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)	110,182	103,313	103,313
F&O(INR cr)	40,714,369	35,493,062	35,493,062

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.7	16.4	16.4
NSE VIX	10.3	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	48,189	0.5 %	1.3 %	Energy	39,562	0.3 %	0.2 %
IT	33,443	(0.8) %	(4.6) %	Pharma	18,586	0.7 %	(3.2) %
Metals	9,140	2.7 %	6.7 %	Finance	21,443	0.5 %	1.2 %
Auto	21,897	(0.1) %	2.4 %	PSU	7,134	(0.2) %	0.3 %
FMCG	53,933	0.1 %	0.1 %	Real Estate	966	0.9 %	2.8 %

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>
Hind.Aeron	3,947	4.0 %	16.0 %	Tata Consu	1,110	(5.4) %	2.1 %
Hindalco I	636	4.0 %	11.9 %	ICICI Pru	576	(3.1) %	(6.6) %
GAIL (Indi	207	3.9 %	13.7 %	Zydus Life	934	(2.7) %	(6.6) %
Cipla	1,398	3.8 %	(6.7) %	Zomato Ltd	184	(1.6) %	(0.1) %
JSW Steel	883	3.7 %	1.2 %	Jio Financ	382	(1.6) %	7.0 %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
German GfK Consumer Climate	25-04-2024	11:30	EUR	-	(27.4)
ECB Economic Bulletin	25-04-2024	13:30	EUR	-	-
German Buba President Nagel Speaks	25-04-2024	20:45	EUR	-	-
CBI Realized Sales	25-04-2024	15:30	GBP	-	2
Advance GDP q/q	25-04-2024	18:00	USD	-	0.034
Pending Home Sales m/m	25-04-2024	19:30	USD	-	0.016
Natural Gas Storage	25-04-2024	20:00	USD	-	-

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