



29 Apr.2024

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	22,420	(0.7) %	(0.2) %
BSE SENSEX	73,730	(0.8) %	(0.4) %
CNX BANK	48,201	(0.6) %	1.3 %
CNX MIDCAP	50,624	0.8 %	3.5 %
CNX SMALLCAP	16,981	0.6 %	7.7 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	38,240	0.4 %	1.4 %
S&P 500	5,100	1.0 %	7.5 %
FTSE 100	8,140	0.8 %	5.4 %
HANG SENG	17,651	2.1 %	5.1 %
NIKKEI	37,935	0.8 %	14.0 %
SHANGHAI COMPOSITE	3,089	1.2 %	4.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	83.32	0.0 %	0.3 %
EUR/USD	1.07	0.2 %	(2.9) %
GBP/USD	1.25	0.4 %	(1.9) %
USD/JPY	155.57	0.4 %	10.3 %
USD/AUD	1.54	(0.2) %	4.5 %
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)	2,338	0.2 %	12.5 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,587	0.0 %	10.7 %
Copper(USD/MT)	9,791	1.2 %	16.1 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.3	(0.0) %	0.1 %
10 Y GSec US 10	4.7	(0.0) %	0.8 %

**Global Economy:** Closely watched readings on inflation released by the Commerce Department on Friday showed consumer prices in the U.S. increased in line with economist estimates in the month of March. The Commerce Department said its consumer price index rose by 0.3 percent in March. Core consumer prices also climbed by 0.3 percent for the second straight month. Meanwhile, the report said the annual rate of consumer price growth accelerated to 2.7 percent in March from 2.5 percent in February. The Commerce Department said personal income climbed by 0.5 percent in March after rising by 0.3 percent in February. Personal spending advanced by 0.8 percent for the second straight month. Revised data released by the University of Michigan on Friday showed consumer sentiment in the U.S. deteriorated by more than previously estimated in the month of April. The University of Michigan said its consumer sentiment index for April was downwardly revised to 77.2 from a preliminary reading of 77.9. Euro area consumers' inflation expectations for the next 12 months hit their lowest since December 2021, results of a monthly survey by the European Central Bank showed Friday. Median expectations for inflation over the next 12 months eased to 3.0 percent from 3.1 percent in February, the ECB Consumer Expectations Survey for March showed. The ECB has an inflation target of 2.0 percent. The Bank of Japan left its key interest rate unchanged near zero. The BoJ policy board unanimously decided to hold the overnight interest rate at around 0 to 0.1 percent.

**Global Indices:** For the week, the Nasdaq spiked by 4.2 percent, the S&P 500 shot up by 2.7 percent and the Dow advanced by 0.7 percent.

**Indian Economy:** India's forex reserves declined \$2.282 billion to \$640.334 billion during the week ended April 19, according to the latest RBI data. The foreign currency assets decreased \$3.793 billion to \$560.86 billion. Gold reserves continued to rise and increased \$1.01 billion to \$56.808 billion during seven days ended April 19. The special drawing rights (SDRs) were down \$43 million to \$18.034 billion, the RBI said. India's reserve position with the International Monetary Fund (IMF) was also down \$2 million to \$4.631 billion in the reporting week.

**Equity Market:** The barometer index, the S&P BSE Sensex dropped 609.28 points or 0.82% to 73,730.16. The Nifty 50 index declined 150.40 points or 0.67% to 22,419.95.

**Corporate News:** Maruti Suzuki India has recorded a standalone net profit of Rs 3,878 crore for the quarter ended March FY24, growing 47.8 percent over a year-ago period, partly driven by strong operating numbers and higher other income. Revenue from operations grew by 19.3 percent on-year to Rs 38,235 crore, with sales volume rising 13.4 percent to 5.84 lakh units during the same period. SBI Life Insurance Company has recorded net profit at Rs 810.8 crore for the January-March FY24 quarter, growing 4.4 percent over the year-ago period. Net premium income for the quarter grew by 26.2 percent year-on-year to Rs 25,116.5 crore, and net commission at Rs 851.4 crore declined by 2.3 percent during the same period.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	3.2	(69.0)	(69.0)
MF(INR cr)	2,347.9	1,283.3	1,283.3

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	132,444	99,742	99,742
F&O(INR cr)	12,121,214	34,796,579	34,796,579

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.0	16.2	16.2
NSE VIX	10.9	11.7	11.7

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	48,201	(0.6) %	1.3 %	Energy	39,968	(0.1) %	1.2 %
IT	33,666	0.3 %	(3.9) %	Pharma	18,995	0.6 %	(1.1) %
Metals	9,223	(0.2) %	7.7 %	Finance	21,354	(0.9) %	0.7 %
Auto	22,112	(0.3) %	3.4 %	PSU	7,380	(0.3) %	3.8 %
FMCG	54,301	0.0 %	0.8 %	Real Estate	969	0.6 %	3.1 %

### 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>
Tech Mahin	1,279	7.4 %	2.7 %	Bajaj Fina	6,731	(7.7) %	(7.2) %
I R F C	158	5.2 %	9.2 %	Bajaj Fins	1,597	(3.5) %	(3.0) %
Havells In	1,640	5.1 %	8.3 %	IndusInd B	1,446	(3.3) %	(6.2) %
Divi's Lab	4,016	4.5 %	12.6 %	Nestle Ind	2,483	(3.1) %	(4.0) %
Vedanta	397	4.1 %	37.9 %	M & M	2,045	(2.5) %	6.7 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Spanish Flash CPI y/y	29-04-2024	12:30	EUR	-	0.032

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