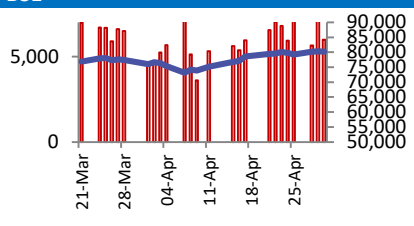
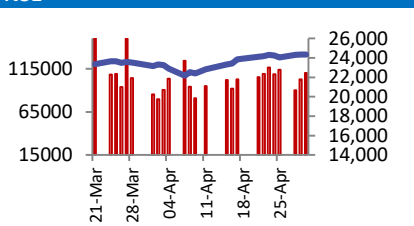


BSE	NSE																												
 <table> <tr><td>Open</td><td>80371</td></tr> <tr><td>High</td><td>80526</td></tr> <tr><td>Low</td><td>79879</td></tr> <tr><td>Close</td><td>80242</td></tr> <tr><td>Change</td><td>-46</td></tr> <tr><td>Volume (Lacs)</td><td>6382</td></tr> <tr><td>Turnover (Rs.inCr)</td><td>5986</td></tr> </table>	Open	80371	High	80526	Low	79879	Close	80242	Change	-46	Volume (Lacs)	6382	Turnover (Rs.inCr)	5986	 <table> <tr><td>Open</td><td>24342</td></tr> <tr><td>High</td><td>24396</td></tr> <tr><td>Low</td><td>24199</td></tr> <tr><td>Close</td><td>24334</td></tr> <tr><td>Change</td><td>-2</td></tr> <tr><td>Volume(Lacs)</td><td>30666</td></tr> <tr><td>Turnover(Rs.in Cr)</td><td>110088</td></tr> </table>	Open	24342	High	24396	Low	24199	Close	24334	Change	-2	Volume(Lacs)	30666	Turnover(Rs.in Cr)	110088
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World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	40753	40669	84	0.2%
Dow Futures	41208	40855	353	0.9%
Nasdaq	17711	17446	264	1.5%
FTSE	8497	8495	2	0.0%
Nikkei	36657	36452	205	0.6%
Hang Seng	22465	22119	346	1.6%
Gift Nifty	24331	24430	(99)	-0.4%
Straits Singapore	3839	3833	7	0.2%
South Korea	2557	2557	1	0.0%
Taiwan	20606	20235	370	1.8%
Shanghai	3279	3279	Closed	Closed

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9206	9125	81	0.9%
Alumin (\$/MT)	2416	2400	17	0.7%
Zinc (\$/MT)	2578	2593	(15)	-0.6%
Brent Crude (\$/bbl)	63	62	1	0.9%
Gold (\$/Ounce)	3245	3239	6	0.2%
Silver (\$/Ounce)	33	32	0	0.7%
Light Crude (\$/bbl)	60	59	1	1.0%
N G (\$/mmbtu)	3	3	(0)	-0.4%
Sugar (\$/MT)	494	493	1	0.2%
Rubber (Rs./kg)	199	199	(0)	-0.1%
Baltic Dry Index	1411	1386	25	1.8%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	84.49	85.25	-0.89%
Rs./ Euro	96.01	97.02	-1.04%
Rs./Chinese Yuan	11.62	11.63	-0.03%
Yen / \$ rate	145.48	145.39	0.06%
\$ US/Euro	1.13	1.13	0.04%

Dollar Index	Current	Previous	Var(%)
Dollar Index	100.08	100.25	-0.17%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24220	54720
Support 2	24100	54340
Resistance	24420	55470

Securities in Ban For Trade
RBLBANK

## Market Review

**US:** Earnings news and a bullish outlook in cloud computing and social networking gave stocks a boost Thursday. The Nasdaq led the advance while other key indexes tagged along for smaller gains, but all succumbed to some profit-taking by session's end.

**Asia:** Asia-Pacific markets rose after China said that it was evaluating possible trade talks with the U.S.

**India:** Nifty ended Wednesday's session at the day's low, as broad-based selling across key sectors and midcaps overshadowed marginal gains in heavyweight stocks. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

**Global economy:** U.S. manufacturing contracted for a second straight month in April as tariffs on imported goods strained supply chains, keeping prices at the factory gate elevated and encouraging some firms to lay off workers. The Institute for Supply Management (ISM) survey showed President Trump's protectionist trade policy was hurting manufacturers. Tariffs were cited as problematic by respondents in every industry, with some taking issue with the disorderly manner in which the import duties were being imposed.

U.S. construction spending unexpectedly fell in March amid broad declines in outlays on private and public projects. The Commerce Department's Census Bureau said that construction spending dropped 0.5% after a slightly downwardly revised 0.6% increase in Feb. Economists polled by Reuters had forecast construction spending gaining 0.2% after a previously reported 0.7% jump in Feb.

South Korea's consumer prices rose 2.1% in April over a year, slightly above market expectations, official data showed on Friday. That compared with a 2.1% rise in March and 2.0% tipped in a Reuters poll of economists. The consumer price index rose 0.1% on a monthly basis, after rising 0.2% in the previous month. It was the slowest since Nov 2024.

**Commodities:** Oil prices rose in Asian trade recovering some recent losses after China said it was open to trade talks with the U.S., sparking hopes for a de-escalation in a bitter trade war between the two economic powerhouses.

Gold prices were poised for their worst weekly performance in more than two months on Friday as receding trade tensions tempered safe-haven demand, while the market's focus shifted to the U.S. non-farm payrolls report, due later in the day.

**Currency:** The dollar has perked up recently as news around trade deals stoked optimism as a sign of things to come in the next 100 days of the Trump administration.

**FII Derivative Transactions (Rs. Cr)**

Contracts	Purchase		Sell		Net	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value		Contract	Value	Contract	Value	Contract	Value
Index Future	22950	3993	15053	2573	1420	160186	27452	157047	26941	3139	511
Index Option	14494264	2627545	14351046	2601141	26404	1605510	283350	2872272	515694	(1266762)	(232344)
Stock Future	363475	22952	322191	19970	2982	5932755	369771	5891507	368461	41248	1310
Stock Option	710770	48780	710585	48545	235	901095	55880	823234	51689	77861	4191
Total	15591459	2703270	15398875	2672229	31041	8599546	736453	9744060	962785	(1144514)	(226332)

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
23-Apr-25		17857	13890	3967
24-Apr-25		21177	15752	5426
25-Apr-25		18713	13673	5040
28-Apr-25		11684	9174	2510
29-Apr-25		15694	13343	2351
Month to date- Apr		266698	256139	10559
FII (Prov.) (Rs. Cr)		Buy	Sell	Net
24-Apr-25		24089	15839	8251
25-Apr-25		15524	12572	2952
28-Apr-25		11680	9206	2474
29-Apr-25		15674	13289	2386
30-Apr-25		25190	25139	51
Month to date-Apr		299966	297231	2735
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
24-Apr-25		13452	13987	(535)
25-Apr-25		16171	12631	3540
28-Apr-25		14436	11619	2818
29-Apr-25		13356	11987	1369
30-Apr-25		14430	12638	1792
Month to date-Apr		273364	245135	28228
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
23-Apr-25		907	2986	(2079)
24-Apr-25		1520	1416	104
25-Apr-25		1960	2852	(893)
28-Apr-25		1354	4265	(2911)
29-Apr-25		1186	3607	(2422)
Month to date- Apr		48266	78200	(29935)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	963	24%	657	23%
Decline	2967	73%	2199	75%
Unchanged	133	3%	58	2%

Market Turnover	30-Apr	29-Apr	Var (%)
BSE Cash	5986	7562	-21%
NSE Cash	110088	102697	7%
NSE Futures	105842	104676	1%
NSE Options	42255025	14392078	194%
Total (Rs.Cr)	42476941	14607013	191%

Volatility Index	30-Apr	29-Apr
Volatility Index	18.22	17.37

Index PE - TTM	30-Apr	Yr. High	Yr. Low
Sensex	22.4	25.2	20.3
Nifty	21.9	24.4	19.6

**Corporate News**
**NCC bags ₹1,663-cr orders in April; building and transport divisions lead wins**

NCC has received orders valuing ₹1,663 Cr (Excluding GST) in the month of April'2025. Out of these orders, ₹1,082 cr relates to the building division, ₹581 cr relates to the transportation division. (CNBC)

**Carlyle looks to exit PNB Housing**

Carlyle is set to divest up to \$308 mn worth of shares in PNB Housing Finance Ltd. through a block trade. The offering involves approximately 27.1 mn shares, constituting about 10.4% of the company's outstanding equity. (ET)

**Infosys to accelerate digital transformation at Yorkshire Building Society**

Infosys to accelerate its digital transformation. As part of the engagement, Infosys will help Yorkshire Building Society deliver a mobile-first, data-enabled, and efficient banking experience for its mortgage, commercial, and savings members. The financial details of the deal were not disclosed. (BS)

**Economy**
**India's total exports jump to record \$825 bn in FY25 as services shipments rise over 13%**

India's exports reached a record USD 824.9 bn in 2024-25, propelled by a surge in services exports to USD 387.5 bn. This represents a 6.01% growth over the previous year, with key sectors like telecommunications and financial services contributing significantly. However, concerns remain about order inflows from the US and Europe, prompting calls for government support. (ET)

**GST collections rise 12.6% to an all-time high of Rs 2.37 lakh cr in April**

India's GST collections reached a record high of Rs 2.37 lakh crore in April, marking a 12.6% surge. This follows a consistent upward trend, with collections rising by 9.9% in March and 9.1% in Feb. GoI had projected an 11% increase in GST revenue for the year, estimating collections at Rs 11.78 lakh crore. (ET)

**International**
**Equinor to sell 60% stake in Brazil's Peregrino field for \$3.5 bln**

Norwegian oil co Equinor has entered a deal to sell its 60% operated interest in Brazil's Peregrino oil field to a unit of PRIO SA, the country's biggest independent oil and gas company. Equinor will receive \$3.35 bn for the stake, plus \$150 mn in interest. "With this transaction we realise value from a long-standing asset in our Brazil portfolio. (Invst)

Top 5 Nifty Gainers	30-Apr	29-Apr	Var(%)
HDFCLIFE	744	715	4.0%
MARUTI	12257	11841	3.5%
BHARTIARTL	1865	1824	2.2%
SBILIFE	1766	1730	2.1%
POWERGRID	307	303	1.5%
Top 5 Nifty Losers	30-Apr	29-Apr	Var(%)
BAJAJFINSV	1952	2067	-5.6%
BAJFINANCE	8635	9093	-5.0%
TRENT	5173	5392	-4.1%
TATAMOTORS	644	666	-3.2%
SBIN	789	813	-2.9%

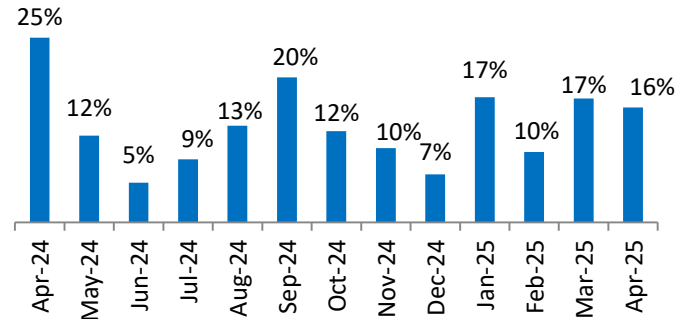
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	80242	-0.1%	0.2%	4.7%	7.5%
MIDCAP	42884	-0.7%	-1.8%	2.9%	0.9%
SMLCAP	47400	-1.7%	-3.8%	0.6%	-0.1%
AUTO	49960	0.1%	-0.5%	4.2%	-3.3%
BANKEX	62622	-0.6%	-0.9%	5.9%	12.3%
Capital Goods	62780	-0.8%	-0.1%	1.4%	-0.9%
FMCG	20454	-0.3%	-2.1%	4.8%	3.9%
Health Care	42211	0.0%	-1.1%	2.6%	18.8%
IT	35051	-0.5%	0.6%	-1.7%	2.7%
METAL	29051	-0.4%	-1.5%	-5.3%	-8.0%
Oil & Gas	26491	0.0%	0.8%	4.5%	-9.8%
Power	6648	-0.9%	-3.6%	1.6%	-9.3%
Realty	6865	1.8%	-1.3%	3.5%	-10.1%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	68801	-1.3%	1.7%	1.1%	-12.4%
Fresh Exposure	5383	19.4%	-15.5%	-3.3%	31.1%
Exposure liquidated	5272	-2.1%	-2.8%	-4.9%	14.3%
Closing Net scripwise outstanding	68913	0.2%	0.5%	1.2%	-11.7%

NSE USD Futures	30-Apr	29-Apr	Var (%)
Apr Expiry (Rs./\$)	87.56	87.25	0.4%
May Expiry (Rs./\$)	87.50	87.00	0.6%
Total Turnover (Rs. Crore)	3770	2227	69%

Sectors	TTM PE
Auto	29.42
Auto Ancillary	40.39
Banking	13.93
Engineering	50.09
Cement	74.56
Diamonds & Jewellery	41.7
Housing Finance	24.78
Infrastructure & Const	27.87
Metals-Aluminium	25.58
Metal – Steel	16.91
Oil Expl.	7.51
Pharma	9.27
Power – Gen. Supp.	38.94
Information Tech.	28.62
Sugar	18.97
Telecom Serv. Prov.	46.86
Tyres	29.32

### TVS Motors Monthly Volume Growth (YoY) (Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.23%	4.22%	1 bps
Japan	1.28%	1.26%	3 bps
India	6.36%	6.34%	1 bps
UK	4.48%	4.44%	4 bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	686	686	0.0%
Inflation - WPI	2.05%	2.38%	(33) bps
Inflation - CPI	3.34%	3.61%	(27) bps

India GDP	Q3FY25	Q2FY25	Var(%)
Growth	6.15%	5.58%	57 bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.25%	6.50%	(25) bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.00%	4.00%	0 bps
O/S Banking System Liquidity (Rs bn)	819	747	72.0

IIP Growth %	Mar-25	Mar-24	Apr-Feb
IIP	3.0	5.5	3.6
Capital Goods	2.4	7.0	6.2
Mining	0.4	1.3	2.2
Manufacturing	3.0	5.9	4.2
Electricity	6.3	8.6	3.8

**ADR Price Movement**

Company	Price (US\$)	Volume	Previous Day Price	Volume	Variance (%)	No. of Share Per ADR	ADR Price (Rs.)	BSE Price	Variance (%)
Infosys Tech	17.60	7752851	17.60	7085545	0.00%	1	1487.05	1500.10	-0.9%
Wipro	2.86	5332494	2.86	5662911	0.00%	1	241.64	241.50	0.1%
Dr.Reddy's	13.83	1454570	13.92	1247104	-0.65%	1	1168.51	1183.90	-1.3%
ICICI Bank	33.52	2480624	33.56	5599239	-0.12%	2	1416.07	1427.00	-0.8%
HDFC Bank	72.28	1223376	72.69	1759775	-0.56%	3	2035.67	1925.00	5.7%

**GDR's (US\$)**

	Prices	Prev. Close	Change	Var %
L&T	39.35	39.20	0.1	0.4%
RIL	65.80	65.30	0.5	0.8%
SBI	93.40	93.20	0.2	0.2%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.40%	2.80%
Unemployment (%)	4.20%	4.10%

Interest Rate (%)	Current	Previous
Fed Rate	4.50%	4.50%

US GDP	Q1CY25	Q4CY24
Growth (QoQ Annualized)	-0.30%	2.40%

China Economy Data	Current	Previous
GDP	5.40%	5.40%
Inflation – CPI (%)	-0.10%	-0.70%

**Economic Calendar**

	Date
Indian GDP Data	30 May
Indian Inflation Data CPI	13 May
Indian Inflation Data WPI	14 May
Indian Monetary Policy	06 Jun
India's Industrial Production (IIP)	28 May
US Inflation Data	13 May
US GDP	29 May
US Unemployment Data	02 May
US Fed Rate	07 May
China GDP	15 Jul
China Inflation Data	10 May

**Event Update**

Name	Date	Purpose
Vesuvius India Ltd.	01/05/25	Rs.14.50 per share(145%)Final Dividend
KSB Ltd.	02/05/25	Rs.4.00 per share(200%)Final Dividend
Mold-Tek Packaging Ltd.	02/05/25	Interim Dividend
United Polyfab Gujarat Ltd.	02/05/25	Split/Subdivision



## Bulk Deal As On 30/04/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539115	ALANSCOTT	ASHISH CHUGH	S	14717	209.55
531406	ANSINDUS	CANARA BANK	S	111816	11.85
539091	CITL	RACHNA RAHUL NIM	S	1224992	1.58
539091	CITL	VARDIP GLOBSTRAT TRADING PRIVATE LIMITED	S	130000	1.58
539091	CITL	VARDIP GLOBSTRAT TRADING PRIVATE LIMITED	B	2693977	1.57
544387	DESCO	SANDEEP SINGH	B	40000	247.39
543521	FONE4	HEMA LAKSHMAN	S	110000	13.35
544108	GPSL	ATUL CHIMANLAL DOSHI (HUF)	B	16800	175.39
532015	GRAVITY	GROWNOURISH TRADING PRIVATE LIMITED	B	100000	4.75
532015	GRAVITY	SHRADDHA VARUN THAKKAR	S	97684	4.75
505336	HARSHILAGR	D3 STOCK VISION LLP	B	6249000	2.85
505336	HARSHILAGR	UMA SHANKAR EXIM PRIVATE LIMITED	S	7500000	2.85
505336	HARSHILAGR	UMA SHANKAR EXIM PRIVATE LIMITED	B	34417000	2.85
544388	IDENTIXWEB	VBCUBE VENTURES FUND	S	54000	61
543286	JETMALL	VISHAL SINGHANIA HUF	B	48000	9.98
540360	LLFICL	MINERVA VENTURES FUND	S	2723179	6.67
526251	MIDEASTP	BRIJESH DEVRAJBHAI PATEL	B	34500	20.11
526251	MIDEASTP	KISHOR AMICHAND SHAH	S	41500	20.04
542724	MURAE	GAUTAM RAJ	B	33500000	1.43
542724	MURAE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	6997370	1.43
542724	MURAE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	20000000	1.43
542724	MURAE	SAKET KUMAR	S	42300000	1.43
531512	ORIENTTR	RANDEEP SINGH	B	150000	21.09
531512	ORIENTTR	YAKSHIT FINANCE LIMITED	S	150427	21.09
530095	PRADHIN	TEUDDY TECHNOLOGY PRIVATE LIMITED	B	5277478	0.44
538452	QUASAR	UMA SHANKAR EXIM PRIVATE LIMITED	S	3267954	0.77
538452	QUASAR	VAKANDA SERVICES PRIVATE LIMITED	S	22353355	0.77
530111	RAJPACK	DEEPAK MAHAVEERCHAND JAIN (HUF)	S	73930	26.89
538540	RLFL	BABITAGUPTA	S	297094	3.37
543244	SHINEFASH	JIGNESH AMRUTLAL THOBHANI	S	30000	316.6
531529	SOFTRAKV	BRIDGE INDIA FUND	B	5250000	3.03
531529	SOFTRAKV	KHODEEAR ENTERPRISE LLP LLP	S	3654963	3.03
544392	SPINAROO	KARNIKA INDUSTRIES LIMITED	B	46000	74.79
539117	SUJALA	SHIVANI ASHWIN BUDHRAJA	B	40000	68.99
539117	SUJALA	YAKSHIT FINANCE LIMITED	S	40000	69.42
530217	SWOJAS	PIYUSH VINODRAI PAREKH	B	351000	19.55
539798	UMIYA	PREETI BHAUKA	S	50473	16.61

NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
CHETANA	Chetana Education Limited	GAURAV PALIWAL	BUY	155200	116.19
GANGAFORGE	Ganga Forging Limited	JAYDEEP CHANDUBHAI KOTWANI	BUY	906000	5.34
INDSWFTLAB	Ind-Swift Labs Ltd.	WILSON HOLDINGS PRIVATE LIMITED	SELL	349331	72.51
JAYBEE	Jay Bee Laminations Ltd	HUTOXY KERSI BHADHA	SELL	197000	241.94
MVKAGRO	M.V.K. Agro Food Prod Ltd	SAVITRIBEN MAHENDRAKUMAR SHAH	BUY	80400	62.13
ORIENTALT	Oriental Trimex Limited	KANAK INNOVATIVE LLP	BUY	450000	11.5
PREMEXPLN	Premier Explosives Ltd	RATNABALI EQUITY PRIVATE LIMITED	SELL	300000	403.73
RVTH	Revathi Equipment India L	ANANT JAIN	SELL	18766	932.57
ROYALARC	Royal Arc Electrodes Ltd	SHARE INDIA SECURITIES LIMITED	SELL	99600	153.34
TANKUP	Tankup Engineers Limited	BHAVUK GHAI	BUY	34000	175.2
TANKUP	Tankup Engineers Limited	HEM RAJ GHAI	BUY	42000	179.42

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