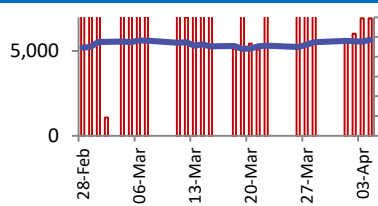
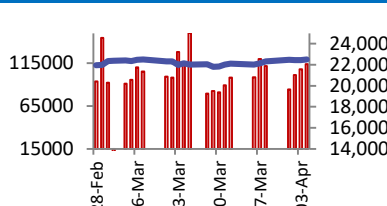


BSE



80,C	Open	74414
75,C	High	74502
65,C	Low	73485
55,C	Close	74228
50,C	Change	351
	Volume (Lacs)	9601
	Turnover (Rs.inCr)	6942

NSE



	Open	22592
	High	22619
	Low	22304
	Close	22515
	Change	80
	Volume(Lacs)	47755
	Turnover(Rs.in Cr)	113885

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	38597	39127	(530)	-1.4%
Dow Futures	38917	38916	1	0.0%
Nasdaq	16049	16277	(228)	-1.4%
FTSE	7976	7937	39	0.5%
Nikkei	38812	39773	(961)	-2.4%
Hang Seng	16532	16725	(193)	-1.2%
Gift Nifty	22542	22571	(29)	-0.1%
Straits Singapore	3205	3235	(30)	-0.9%
South Korea	2713	2742	(29)	-1.1%
Taiwan	20338	20338	Closed	Closed
Shanghai	3069	3069	Closed	Closed

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9252	9359	(107.0)	-1.1%
Alumin (\$/MT)	2430	2445	(15.0)	-0.6%
Zinc (\$/MT)	2613	2646	(33.0)	-1.2%
Brent Crude (\$/bbl)	91.0	91.0	0.0	0.0%
Gold (\$/Ounce)	2274	2291	(17.0)	-0.7%
Silver (\$/Ounce)	26.0	27.0	(1.0)	-3.7%
Light Crude (\$/bbl)	87.0	87.0	0.0	0.0%
N G (\$/mmbtu)	2.0	2.0	0.0	0.0%
Sugar (\$/MT)	625.0	623.0	2.0	0.3%
Rubber (Rs./kg)	185.0	185.0	0.0	0.0%
Baltic Dry Index	1669	1711	(42.0)	-2.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.45	83.43	0.02%
Rs./ Euro	90.60	89.84	0.85%
Rs./Chinese Yuan	11.57	11.57	0.00%
Yen /\$ rate	151.17	151.34	-0.11%
\$ US/Euro	1.08	1.08	0.00%

Dollar Index	Current	Previous	Var(%)
Dollar Index	104.33	104.12	0.20%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22370	47970
Support 2	22240	47740
Resistance	22640	48380

Securities in Ban For Trade	
HINDCOPPER	SAIL
ZEEL	

Market Review

US: The three major U.S. stock indexes fell more than 1% each and the S&P 500 had its biggest daily percentage drop since Feb. 13 on Thursday as Federal Reserve officials took a cautious approach in comments on the outlook for interest rate cuts, and investors braced for Friday's U.S. monthly jobs report.

Asia: Asian markets opened lower on Friday following declines on Wall Street, with investors closely watching US jobs data due later in the day. A sharp reversal on Wall Street on Thursday, triggered by remarks from a US Fed official suggesting no rate cuts this year, is dampening sentiment across Asia.

India: On Thursday, the domestic equity indices snapped a two-day losing run and ended higher ahead of the RBI monetary policy decision. The Sensex gained 350.81 points to close at 74,227.63, while the Nifty 50 settled 80.00 points, or 0.36%, higher at 22,514.65. **Market is expected to open gap down and likely to witness profit booking during the day.**

Global Economy: Japanese household spending fell 0.5% in February from a year earlier, down for a 12th straight month but better than the median market forecast for a 3.0% decline. When adjusted for the leap year effect of having one more calendar day on Feb. 29 compared to regular years, household spending fell 2.7% in February year-on-year, according to the government's estimate of the data. On a seasonally adjusted, month-on-month basis, spending increased 1.4%, also better than an estimated 0.5% gain.

Australia's trade balance fell more than expected to a five-month low in February, as exports- particularly those of Australia's key iron ore products- fell substantially during the month. Australia's trade balance shrank to a surplus of A\$7.28 billion (\$4.79 billion). The figure was weaker than expectations of A\$10.5 billion, and shrank substantially from the A\$11.03 billion seen in January. The country's trade balance hit its weakest level since September.

Commodities: Gold prices hit a pause on Friday after scaling to historic highs in the previous session on expectations of lower U.S. interest rates this year, while traders await further cues from a key jobs report due later in the day.

Oil prices extended gains on Thursday, settling up more than \$1 as geopolitical tensions and output cuts outweighed caution about U.S. Federal Reserve rate cuts.

Currency: The U.S. dollar held steady against peer currencies on Friday after rebounding from a two-week low, as traders braced for a key jobs report due later in the day and grew cautious over tensions in the Middle East.

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	66832	6069	68703	6823	(754)	238952	22136	255631	23650	(16679)	(1514)
Index Option	38354330	4054156	37549401	3963296	90860	2159976	196088	2654240	268096	(494264)	(72008)
Stock Future	297777	24885	375222	31471	(6586)	3131491	258985	3125786	258507	5705	478
Stock Option	543883	48063	544691	48143	(80)	261715	22834	230131	20145	31584	2689
Total	39262822	4133173	38538017	4049733	83440	5792134	500043	6265788	570398	(473654)	(70355)

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
27-Mar-24	20870	24041	(3171)
28-Mar-24	19965	15922	4043
1-Apr-24	39848	37493	2355
2-Apr-24	14908	15355	(447)
3-Apr-24	14852	16107	(1255)
Month to date-Apr	69608	68955	653
FII (Prov.) (Rs Cr)	Buy	Sell	Net
28-Mar-24	24809	24620	188
1-Apr-24	8818	9340	(522)
2-Apr-24	13279	14902	(1623)
3-Apr-24	13813	16026	(2214)
4-Apr-24	13479	14615	(1136)
Month to date-Apr	49388	54883	(5495)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
28-Mar-24	12428	9737	2692
1-Apr-24	10193	8985	1208
2-Apr-24	12163	10211	1953
3-Apr-24	13037	11935	1102
4-Apr-24	12219	13112	(893)
Month to date-Apr	47613	44243	3370
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
27-Mar-24	3610	1127	2482
28-Mar-24	3517	2076	1441
1-Apr-24	5992	1269	4723
2-Apr-24	2628	1633	994
3-Apr-24	2147	5801	(3654)
Month to date-Apr	10767	8703	2064

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2382	60%	1579	60%
Decline	1465	37%	984	37%
Unchanged	100	3%	75	3%

Market Turnover	04-Apr	03-Apr	Var (%)
BSE Cash	6942	6934	0%
NSE Cash	113885	107960	5%
NSE Futures	163030	133707	22%
NSE Options	56159944	55489426	1%
Total (Rs.Cr)	56443801	55738027	1%

Volatility Index	04-Apr	03-Apr
Volatility Index	11.22	11.37

Index PE - TTM	04-Apr	Yr. High	Yr. Low
Sensex	25.3	26.0	22.2
Nifty	23.1	28.8	20.3

Corporate News

Royal Orchid signs lease for 300-room hotel

Royal Orchid to launch upscale brand with 5-star hotels in Mumbai and Surat, expanding presence nationwide. It plans to launch three more brands, including one this year which will have five-star offerings. It has signed a lease agreement with MASA Hotels for a 300-room hotel at Mumbai's intl airport, which will operate under its new five-star brand. (ET)

Prestige Group buys Rs 450-crore land in Bengaluru

Prestige Group has acquired around 21 acres of land in Bengaluru's Whitefield for Rs 450 cr. The acquired land will be planned for Residential Development spanning approximately 4 mn sqft of developable area, comprising around 1,800 apartments with a projected GDV of Rs 4,500 cr. (ZEE)

HDFC Credila to raise Rs 2,700 cr in fresh equity

HDFC Credila Fin Services is looking at a fresh capital infusion of Rs 2,700 cr after a new set of investors, global investors EQT and ChrysCapital, came on board in FY24. Besides EQT, ChrysCapital, and HDFC Bank, Shinhan Bank will chip in as an investor. The board has cleared a proposal for raising fresh equity. Shinhan Bank will infuse Rs 1,500 cr through preferential issuance. EQT, ChrysCapital, and HDFC Bank will invest up to Rs 1,200 crore through a rights issue of shares. (BS)

Economy

Services sector growth picks up in March on robust demand

The seasonally adjusted HSBC India Services Business Activity Index rose to 61.2 in March from 60.6 in Feb. The performance was largely attributed to healthy demand conditions, efficiency gains and robust sales. The HSBC India Composite PMI Output Index rose to 61.8 in March from 60.6 in Feb, the second-strongest growth in over 13-and-a-half years. (ET)

RBI push for bringing down cost of remittances at WTO

India has submitted to WTO that "promoting interoperability and interlinkages of digital payment infrastructures, including fast payment systems", can be one of the means to achieve cheaper, faster and more transparent and accessible cross-border payments. The global average cost for sending remittances is 6.18%, higher than the sustainable development goal to reduce it to less than 3%. Around 78% of total remittances go to low- and middle-income countries. (ET)

International

Samsung forecasts surge in Q1 sales as demand recovers

Samsung expects a substantial increase in its Q1 OP and sales, likely benefited from increased demand across most of its units from AI. It expects consolidated operating profit for the three months to March 31 at an average of 6.6 tn won (\$4.9 bn), up from the 640 bn won seen last year. (Inv)

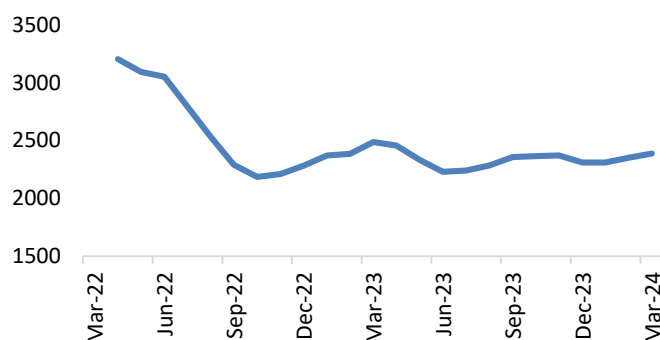
Top 5 Nifty Gainers	04-Apr	03-Apr	Var(%)
HDFCBANK	1528	1482	3.1%
EICHERMOT	4014	3934	2.0%
TECHM	1279	1255	1.9%
TITAN	3783	3713	1.9%
ASIANPAINT	2918	2869	1.7%
Top 5 Nifty Losers	04-Apr	03-Apr	Var(%)
ONGC	269	275	-2.3%
SHRIRAMFIN	2499	2556	-2.2%
ADANI PORTS	1367	1397	-2.2%
BPCL	599	611	-2.0%
BHARTIARTL	1207	1226	-1.5%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	74228	0.5%	1.7%	0.7%	24.4%
MIDCAP	40625	-0.1%	4.0%	1.7%	68.0%
SMLCAP	45804	0.5%	6.5%	1.3%	66.4%
AUTO	49480	0.3%	1.9%	2.2%	73.7%
BANKEX	54140	0.6%	2.0%	0.2%	16.6%
Capital Goods	62605	0.2%	4.3%	6.1%	77.8%
FMCG	19323	-0.3%	0.7%	0.0%	16.0%
Health Care	35503	0.1%	2.5%	2.3%	61.0%
IT	36224	0.9%	2.2%	-3.1%	26.2%
METAL	29567	0.1%	6.0%	4.3%	52.9%
Oil & Gas	27875	-1.6%	1.7%	-4.1%	61.5%
Power	7008	0.4%	6.3%	2.3%	96.4%
Realty	7285	-0.2%	3.0%	-0.8%	131.7%

NSE USD Futures	04-Apr	03-Apr	Var (%)
March Expiry (Rs./\$)	83.44	83.49	-0.1%
April Expiry (Rs./\$)	83.47	83.58	-0.1%
Total Turnover (Rs. Crore)	21319	35861	-41%

Sectors	TTM PE
Auto	32.2
Auto Ancillary	44.5
Banking	15.87
Engineering	39.81
Cement	83.26
Diamonds & Jewellery	42.3
Housing Finance	19.81
Infrastructure & Const	32.43
Metals-Aluminium	42.96
Metal - Steel	16.75
Oil Expl.	17.66
Pharma	12.67
Power – Gen. Supp.	46.76
Information Tech.	20.53
Sugar	13.51
Telecom Serv. Prov.	82.48
Tyres	26.18

Titanium Dioxide (\$/Tonne) (Source: BBG)



10 year G-Sec Yield	Current	Previous	Change
US	4.31%	4.31%	0 bps
Japan	0.78%	0.79%	(1) bps
India	7.09%	7.10%	(1) bps
UK	4.02%	4.06%	(4) bps
Libor 3 Mths	5.57%	5.57%	0 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation - WPI	0.20%	0.27%	(7) bps
Inflation - CPI	5.09%	5.10%	(1) bps

India GDP	Q3FY24	Q2FY24	Var(%)
Growth	8.36%	7.60%	76 bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.50%	6.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.50%	4.50%	0 bps
O/S Banking System Liquidity (Rs bn)	1446	1439	6.6

IIP Growth %	Jan-24	Jan-23	Apr-Feb
IIP	3.8	5.8	6.0
Mining	5.9	9.0	8.5
Manufacturing	3.2	4.5	5.7
Electricity	5.6	12.7	7.0

Bulk Deal As On 04/04/24

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
543319	AAPLUSTRAD	SHUBHAM ASHOKBHAI PATEL	B	112000	12.09
541988	AAVAS	SMALLCAP WORLD FUND INC	S	582973	1420.19
513119	ABCGAS	ADVANCED ENERGY SYSTEMS LLP	S	57661	70.15
513119	ABCGAS	ARJUN LEASING AND FINANCE PVT LTD .	S	79882	70.15
513119	ABCGAS	DHARMISHTHA SANJAYKUMAR PATEL	S	18584	70.15
513119	ABCGAS	FROID FINANCE AND INVESTMENTS PVT LTD	S	33989	70.15
513119	ABCGAS	GOPALKUMAR BHIKHALAL BALDHA	B	128074	70.15
513119	ABCGAS	HEMEN JOSHI HUF	S	15684	70.15
513119	ABCGAS	HIGHLAND FINANCES & INVESTMENTS PRIVATE LIMITED	S	41581	70.15
513119	ABCGAS	JAGDISH AMRUTLAL AKHANI HUF	S	80090	70.15
513119	ABCGAS	KAJAL GOPAL BALDHA	B	180000	70.15
513119	ABCGAS	KOMALAY INVESTRADE PRIVATE LIMITED	S	25600	70.15
513119	ABCGAS	PARESHBHAI AMRUTLAL SHAH	S	18155	70.15
513119	ABCGAS	PUNITBHAIBAVANJIBHAILAKKAD	B	90000	70.15
540545	BGJL	SHEETAL KALYANI	B	173441	23.7
543439	BRANDBUCKET	MINIBOSS CONSULTANCY PRIVATE LIMITED	S	518000	12.53
543439	BRANDBUCKET	SANKET RAMESH FUKE	B	752000	12.55
543439	BRANDBUCKET	YOGESH JOTIRAM KALE	S	560000	12.68
530249	BRIDGESE	RONAKKUMAR SANJAYBHAI PATEL	S	23657	23.98
544151	CHATHA	VARSU INDIA GROWTH STORY SCHEME 1	S	190000	78.2
543606	CONTAINER	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	34000	96.32
543606	CONTAINER	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	16000	96.32
512379	CRESSAN	SETU SECURITIES PVT LTD	B	2000000	17.2
544156	GCONNECT	MILIND MADHANI SECURITIES PRIVATE LIMITED	B	24000	46.3
544156	GCONNECT	RC SPL SHARE BROKING PRIVATE LIMITED	S	30000	42.88
544156	GCONNECT	STEPTRADE REVOLUTION FUND	B	30000	43
531592	GENPHARMA	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	3000000	2.69
513337	GUJTLRM	SHUBHAM ASHOKBHAI PATEL	S	642099	49.08
513337	GUJTLRM	SHUBHAM ASHOKBHAI PATEL	B	635396	49.13
513337	GUJTLRM	VIKI JAYESHKUMAR SHAH	S	500000	49.21
543769	INDONG	ZYANA STOCKS AND COMMODITIES	B	88000	22.07
522183	ITL	GAURAVAGRAWAL	S	17252	383
522183	ITL	GAURAVAGRAWAL	B	2250	382.98
522183	ITL	ZAKI ABBAS NASSER	B	35000	383.15
514360	KRRAIL	GANGAVARAPU PRASANTH	S	108179	605.05
539762	MEAPL	BEELINE MERCHANT BANKING PRIVATE LIMITED	B	18503	101.86
542206	NIVAKA	MALANI WEALTH ADVISORS PRIVATE LIMITED	B	767000	4.15
542206	NIVAKA	SUMIT KUMAR RAMESH GUPTA	S	720000	4.15
523862	PIFL	B.M. HOUSE (INDIA) LIMITED	S	32125	17
523862	PIFL	B.M. HOUSE (INDIA) LIMITED	B	1200	17.01
523862	PIFL	PHOOL DEVI GHOSAL	B	32300	17
544143	ROYAL	KADAYAM RAMANATHAN BHARAT	B	34000	134.96
544143	ROYAL	RIKHAV SECURITIES LIMITED	S	82000	141.31
544143	ROYAL	RIKHAV SECURITIES LIMITED	B	10000	137.78
542753	SEACOAST	TOPGAIN FINANCE PRIVATE LIMITED	S	3087838	4.18
538875	SELLWIN	VIRAL MUKUNDBHAI SHAH	B	90000	20.6
543391	SGFRL	NEEPA PRAFUL KOTHARI	S	222000	105.02
543391	SGFRL	SUSHIL KUMAR AGARWAL	B	450000	105
543391	SGFRL	VENKATESHWARA INDUSTRIAL PROMOTION CO LIMITED	S	141000	105.07

540072	SHIVAEXPO	POONAM BABULAL SHAH	B	200000	9.98
540072	SHIVAEXPO	VIKAS BAWEJA	S	130000	10
543924	SONALIS	ABHIJITH PUTTA	S	14000	38.84
543924	SONALIS	DHARINI SUHAG SHAH	B	12000	38.82
531370	SPAR	A1 POWER TOOLS PRIVATE LIMITED	S	78552	20.76
531370	SPAR	ATOR ADVISERS PRIVATE LIMITED	S	98182	20.09
531628	TEJASSVI	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	B	50000	72.76
539428	TEJNAKSH	PIYUSH SECURITIES PVT LTD	S	15000	23.75
539428	TEJNAKSH	PIYUSH SECURITIES PVT LTD	B	122897	23.19
539428	TEJNAKSH	PIYUSH TRADES & CREDITS PRIVATE LIMITED	S	125000	23.19
539310	THINKINK	BOFA SECURITIES EUROPE SA	B	300000	41.76
539310	THINKINK	PIYUSH SECURITIES PVT LTD	S	225000	39.78
544002	VIVAA	ANIL GOYAL HUF	B	88000	29.5
544002	VIVAA	ASNANI STOCK BROKER PRIVATE LIMITED	S	88000	29.5
530057	VIVANZA	ARDENT VENTURES LLP	S	1814009	7.59
509026	VJTFEDU	MANJU V GUPTA	S	100000	136
509026	VJTFEDU	VINAY DHARAMCHAND JAIN	B	101000	136

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AAVAS	Aavas Financiers Limited	SMALLCAP WORLD FUND INC	SELL	423031	1421.05
ASPIRE	Aspire & Innovative Adv L	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	108000	56.35
BTML	Bodhi Tree Multimedia Ltd	BANKE TRADELINK PRIVATE LIMITED	SELL	64252	184.04
BTML	Bodhi Tree Multimedia Ltd	MAULIK RAJENDRABHAI SHAH	SELL	64000	184.1
BTML	Bodhi Tree Multimedia Ltd	VARUN KRISHNAVATAR KABRA	BUY	65000	184.1
CREATIVE	Creative Newtech Limited	SG PREFAB ENGINEERING PRIVATE LIMITED	SELL	200000	795.01
CUPID	Cupid Limited	CLIFF TREXIM PRIVATE LIMITED	SELL	675000	123
GRASIMPP	Grasim Industries Limited	MORGAN STANLEY ASIA SINGAPORE PTE	SELL	120204	1041.23
IRISDOREME	Iris Clothings Limited	PATNI FINANCIAL SERVICES PVT LTD	BUY	500000	79
IRISDOREME	Iris Clothings Limited	SHREEJI WEALTH MANAGEMENT PRIVATE LIMITED	SELL	415000	79.08
JALAN	Jalan Transolu. India Ltd	JOSEPH DEVASSY CHIRAYATH	SELL	81000	4.14
KTL	Kalahridhaan Trendz Ltd	ANKIT MAHENDRABHAI PARLESHA	SELL	102000	53.09
KTL	Kalahridhaan Trendz Ltd	MAHADEV MANUBHAI MAKVANA	SELL	192000	53.01
KTL	Kalahridhaan Trendz Ltd	NIKHIL RAJESH SINGH	SELL	213000	52.12
KTL	Kalahridhaan Trendz Ltd	PANKAJKUMAR JAYANTILAL PATEL	BUY	102000	54.01
MADHUSUDAN	Madhusudan Masala Limited	ARUNA R JAIN	SELL	68000	100.46
NAMAN	Naman In-Store (India) L	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	160000	108.65
NAMAN	Naman In-Store (India) L	SMC GLOBAL SECURITIES LIMITED	BUY	132800	109.53
OMFURN	Omfurn India Limited	AJAY KUMAR AGGARWAL	BUY	314400	76.52
OMFURN	Omfurn India Limited	GRETEX SHARE BROKING LIMITED	SELL	216000	75.89
OMFURN	Omfurn India Limited	PROGNOSIS SECURITIES PVT. LTD	BUY	62400	78.74
RELCHEMQ	Reliance Chemotex Ind Ltd	DEEPAKKUMAR DEVCHANDBHAI MANGROLIYA	BUY	41568	243.37
RHL	Robust Hotels Limited	WHITEPIN TIE UP LIMITED	SELL	100000	158.1
SECL	Salasar Exterior Cont Ltd	MALANI WEALTH ADVISORS PRIVATE LIMITED	BUY	700000	18.5
SECL	Salasar Exterior Cont Ltd	NIKUNJ ANILKUMAR MITTAL	SELL	700000	18.5
SECURCRED	SecUR Credentials Limited	PAKKHI HEGDE	SELL	213208	21
TARMAT	Tarmat Limited	L7 HITECH PRIVATE LIMITED	BUY	193621	108.15
TRUST	Trust Fintech Limited	INDIA EQUITY FUND 1	BUY	264000	150.21
VAISHALI	Vaishali Pharma Limited	SHAH NISHANT	BUY	106500	168.31

Disclosure:

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Nirmal Bang Research (Division of Nirmal Bang Securities Pvt. Ltd.)

B-2, 301/302, Marathon Innova,
Opp. Peninsula Corporate Park
Off. Ganpatrao Kadam Marg
Lower Parel(W), Mumbai-400013
Board No. : 91 22 6723 8000/8001
Fax. : 022 6723 8010