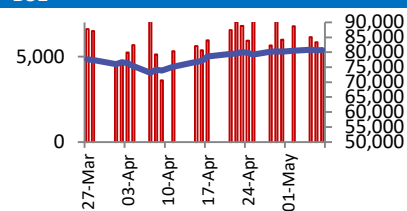
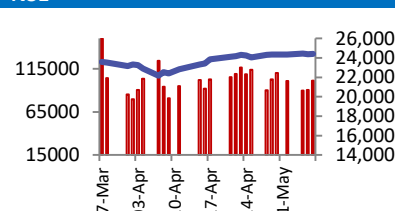


BSE



Open	79949
High	80845
Low	79937
Close	80747
Change	106
Volume (Lacs)	6689
Turnover (Rs.inCr)	5315

NSE



Open	24233
High	24450
Low	24220
Close	24414
Change	35
Volume(Lacs)	33197
Turnover(Rs.in Cr)	101223

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	41114	40829	285	0.7%
Dow Futures	41342	41214	128	0.3%
Nasdaq	17738	17690	49	0.3%
FTSE	8559	8597	(38)	-0.4%
Nikkei	36863	36780	83	0.2%
Hang Seng	22849	22692	157	0.7%
Gift Nifty	24423	24418	5	0.0%
Straits Singapore	3855	3865	(10)	-0.3%
South Korea	2581	2574	7	0.3%
Taiwan	20644	20546	97	0.5%
Shanghai	3349	3343	7	0.2%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9420	9538	(119)	-1.2%
Alumin (\$/MT)	2383	2427	(45)	-1.8%
Zinc (\$/MT)	2617	2633	(16)	-0.6%
Brent Crude (\$/bbl)	61	61	0	0.4%
Gold (\$/Ounce)	3406	3364	42	1.2%
Silver (\$/Ounce)	33	32	0	1.0%
Light Crude (\$/bbl)	58	58	0	0.5%
N G (\$/mmbtu)	4	4	0	0.2%
Sugar (\$/MT)	485	494	(8)	-1.7%
Rubber (Rs./kg)	196	195	1	0.3%
Baltic Dry Index	1374	1406	(32)	-2.3%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	84.83	84.44	0.47%
Rs./ Euro	96.34	95.51	0.86%
Rs./Chinese Yuan	11.73	11.74	-0.09%
Yen / \$ rate	143.62	143.83	-0.15%
\$ US/Euro	1.13	1.13	0.24%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.68	99.61	0.06%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24340	54240
Support 2	24270	54000
Resistance	24470	55000

Securities in Ban For Trade	
CDSL	
RBLBANK	MANAPPURAM

Market Review

US: U.S. stocks advanced on Wednesday in choppy trading, buoyed as semiconductor stocks rallied late on a report that regulations on artificial intelligence chips would be loosened.

Asia: Asian stocks traded in a tight range at the open after the Federal Reserve reiterated it isn't in a rush to lower interest rates, and investors awaited the trade negotiations between China and the US before taking risky bets.

India: India's stock markets remained largely unaffected following the military strikes on terrorist camps across the border in Pakistan. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

Global economy: The latest economic data shows a significant surge in Consumer Credit, a key indicator of consumer spending and confidence. The actual figure stands at 10.17B, exceeding the forecasted value of 9.80B. This rise in Consumer Credit is not only a positive signal for the US Dollar (USD), but also indicates a potential uptick in consumer spending, a major driver of the US economy.

Trump will announce a trade deal with a major country on Thursday, with a report from the New York Times stating that the country was likely the UK. "Big News Conference tomorrow morning at 10:00 A.M., The Oval Office, concerning a MAJOR TRADE DEAL WITH REPRESENTATIVES OF A BIG, AND HIGHLY RESPECTED, COUNTRY. THE FIRST OF MANY!!!," Trump said in a post on Truth.Social.

Trump announced that the U.S. might soon ease microchip export restrictions to some Gulf countries, with an announcement expected soon. This comes as Trump prepares for a Middle East tour, signaling his intent to strengthen ties with the region. He also plans to address the potential renaming of the Persian Gulf, a move that could impact relations with Iran.

Commodities: Oil prices steadied on Thursday after falling more than \$1 in the previous session as uncertainty over the outcome of trade talks between the U.S. and China, the world's two largest oil consumers, weighed on investor sentiment.

Gold prices climbed on Thursday after the Federal Reserve warned of rising inflation and labor market risks fuelling economic uncertainty, while investors awaited the U.S.-China trade talks.

Currency: The U.S. dollar held steady against the euro on Thursday following its biggest rise in two weeks a day earlier, when the Federal Reserve warned of rising risks to the economy from higher inflation and unemployment.

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	22511	3831	19406	3362	469	166488	28645	171421	29410	(4933)	(765)
Index Option	8104377	1463493	8130230	1467962	(4469)	3099353	555569	2851844	508981	247509	46588
Stock Future	349090	20899	305075	18763	2136	5988235	374402	5984464	371028	3771	3374
Stock Option	927932	61288	889798	58927	2361	1180387	73315	1127919	69488	52468	3827
Total	9403910	1549511	9344509	1549014	497	10434463	1031931	10135648	978907	298815	53024

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
29-Apr-25		15694	13343	2351
30-Apr-25		25357	25184	173
2-May-25		18050	15244	2807
5-May-25		10469	8673	1796
6-May-25		13482	9470	4011
Month to date- May		42001	33387	8614
FII (Prov.) (Rs. Cr)		Buy	Sell	Net
30-Apr-25		25190	25139	51
2-May-25		18130	15360	2770
5-May-25		9366	8868	498
6-May-25		13471	9677	3795
7-May-25		16372	13786	2586
Month to date-May		57339	47691	9648
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
30-Apr-25		14430	12638	1792
2-May-25		13906	10616	3290
5-May-25		13918	11129	2789
6-May-25		10963	12361	(1398)
7-May-25		13169	10791	2378
Month to date-May		51956	44896	7060
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
29-Apr-25		1186	3607	(2422)
30-Apr-25		3134	4949	(1816)
2-May-25		1618	1317	301
5-May-25		1706	1095	611
6-May-25		3311	4535	(1224)
Month to date- May		6635	6946	(312)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2099	52%	1682	58%
Decline	1800	44%	1130	39%
Unchanged	147	4%	72	2%

Market Turnover	07-May	06-May	Var (%)
BSE Cash	5315	5831	-9%
NSE Cash	101223	90454	12%
NSE Futures	117230	108497	8%
NSE Options	21217231	10843827	96%
Total (Rs.Cr)	21441000	11048609	94%

Volatility Index	07-May	06-May
Volatility Index	19.00	19.00

Index PE - TTM	07-May	Yr. High	Yr. Low
Sensex	22.5	25.2	20.3
Nifty	22.0	24.4	19.6

Corporate News
Lupin launches seizure drug eslicarbazepine acetate in US after FDA approval

Drug firm Lupin Limited has launched eslicarbazepine acetate tablets in the US after securing approval from the USFDA for its abbreviated new drug application (ANDA). The product, available in 200 mg, 400 mg, 600 mg, and 800 mg strengths, is the generic equivalent of Sumitomo Pharma America's Aptiom and is indicated for the treatment of partial-onset seizures in patients aged four years and above. (CNBC)

Techno Electric: The Company launched Techno Digital Infra arm with wholly owned digital infrastructure arm

The company launched Techno Digital Infra arm with wholly owned digital infrastructure arm for an ambitious investment plan of \$1 bn to develop integrated network of hyperscale and edge data Centre's targeting a cumulative capacity of 250 MW spread across country. (NDTV)

Jindal Drilling secured a three-year contract from ONGC

The company secured a three-year contract from ONGC for the deployment of their rig Jindal Explorer at an Effective Day Rate (EDR) of \$35,138.71, with the current contract ending in Q1 FY26 and the new contract commencing in Q3 FY26. (NDTV)

Economy
India opens govt procurement sector for UK firms under FTA

India expands trade opportunities for British firms. The move follows a free trade agreement. British companies can now bid on Indian government contracts. This access applies to central-level entities. State and local government contracts are excluded. The agreement includes provisions for 'Make in India' and supports small businesses. Concerns arise about competition with Indian MSMEs. (ET)

FTA perks: UK gets to sell 22,000 premium EVs in India

The India-UK FTA includes provisions for EV trade, with the UK gaining access to a quota for selling 22,000 high-value EVs at a 10% duty, while India gets a quota for low- and mid-range EV exports to Britain. India will lower automotive tariffs to 10% from the current duty of more than 100%. (ET)

International
Boeing proposes 2027 delivery date for new Air Force One jets, official says

Boeing has proposed delivering its delayed new version of Air Force One in 2027. President Donald Trump negotiated with Boeing for a pair of new 747-8 aircraft during his 2017-2021 first administration. They were initially expected to be delivered in 2024. (Invst)

Top 5 Nifty Gainers	07-May	06-May	Var(%)
TATAMOTORS	680	648	5.0%
BAJFINANCE	8987	8798	2.1%
SHRIRAMFIN	637	623	2.1%
JIOFIN	256	251	2.0%
ETERNAL	237	233	1.8%
Top 5 Nifty Losers	07-May	06-May	Var(%)
ASIANPAINT	2334	2418	-3.5%
SUNPHARMA	1781	1819	-2.1%
BAJAJ-AUTO	7849	7946	-1.2%
GRASIM	2700	2729	-1.1%
RELIANCE	1406	1421	-1.0%

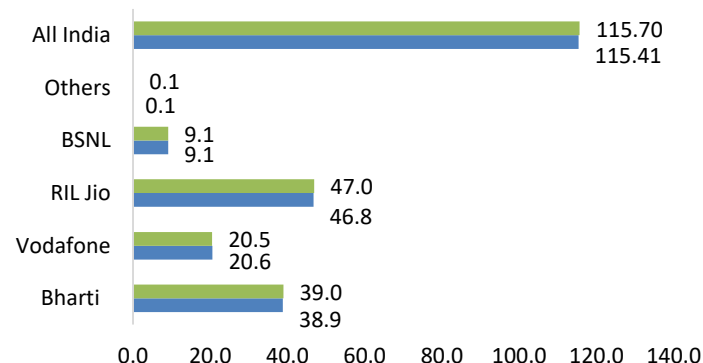
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	80747	0.1%	0.6%	8.8%	9.9%
MIDCAP	42970	1.4%	-0.5%	7.9%	3.5%
SMLCAP	47378	1.2%	-1.8%	5.4%	2.7%
AUTO	51788	1.7%	3.7%	14.8%	1.3%
BANKEK	61893	0.5%	-1.7%	6.7%	13.1%
Capital Goods	62384	0.4%	-1.4%	7.0%	-0.7%
FMCG	20520	-0.4%	0.0%	4.4%	1.8%
Health Care	41980	-0.1%	-0.5%	4.8%	19.7%
IT	35224	0.2%	-0.1%	7.8%	3.3%
METAL	29094	1.2%	-0.3%	7.7%	-7.2%
Oil & Gas	26745	0.4%	1.0%	10.7%	-5.9%
Power	6562	0.9%	-2.2%	2.9%	-8.5%
Realty	6704	1.1%	-0.6%	8.8%	-11.1%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	68637	-0.5%	-0.2%	-0.4%	-11.9%
Fresh Exposure	5291	11.9%	-1.7%	-4.2%	6.4%
Exposure liquidated	4681	-7.8%	-11.2%	3.1%	0.4%
Closing Net scripwise outstanding	69246	0.9%	0.5%	-0.9%	-11.5%

NSE USD Futures	07-May	06-May	Var (%)
Apr Expiry (Rs./\$)	87.00	87.00	0.0%
May Expiry (Rs./\$)	87.56	87.56	0.0%
Total Turnover (Rs. Crore)	2433	2994	-19%

Sectors	TTM PE
Auto	29.55
Auto Ancillary	40.53
Banking	14.07
Engineering	47.17
Cement	73.95
Diamonds & Jewellery	40.93
Housing Finance	24.61
Infrastructure & Const	27.99
Metals-Aluminium	26.57
Metal – Steel	16.92
Oil Expl.	7.67
Pharma	9.2
Power – Gen. Supp.	38.95
Information Tech.	26.95
Sugar	18.59
Telecom Serv. Prov.	47.74
Tyres	30.91

Telecom Subscriber No's Mar'25 (Source: TRAI,NBRR)



■ Total Sub Figures Previous Month Mar'25
■ Total Sub Figures Previous Month Feb'25

10 year G-Sec Yield	Current	Previous	Change
US	4.28%	4.27%	1 bps
Japan	1.29%	1.31%	(2) bps
India	6.34%	6.35%	(1) bps
UK	4.46%	4.51%	(5) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	688	688	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)	1571	1312	258.6

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	17.71	5478956	17.77	8333394	-0.34%	1	1502.36	1508.30	-0.4%
Wipro	2.90	5444367	2.89	4832495	0.35%	1	246.01	244.04	0.8%
Dr.Reddy's	13.52	1843301	13.51	2057495	0.07%	1	1146.92	1160.70	-1.2%
ICICI Bank	33.80	4157702	33.84	3105365	-0.12%	2	1433.65	1435.40	-0.1%
HDFC Bank	72.83	2636478	73.02	1854599	-0.26%	3	2059.42	1945.60	5.9%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	39.30	39.80	(0.5)	-1.3%
RIL	66.30	67.30	(1.0)	-1.5%
SBI	91.50	92.00	(0.5)	-0.5%

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

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	06 June
US Fed Rate	To be announced
China GDP	15 July
China Inflation Data	10 May

Event Update

Name	Date	Purpose
CRISIL Ltd.	07/05/25	First Interim Dividend
Info Edge (India) Ltd.	07/05/25	Stock Split from Rs.10/- to Rs.2/-
Oracle Financial Services Software Ltd.	08/05/25	Equity Rs.265.00 per share(5300%)Interim Dividend
Rajasthan Tube Manufacturing Company Ltd.	08/05/25	Stock Split from Rs.10/- to Re.1/-
Anand Rathi Wealth Ltd.	09/05/25	Rs.7.00 per share(140%)Final Dividend
Bajaj Finance Ltd.	09/05/25	Equity Rs.12.00 per share(600%)Special Dividend
Bank Of Maharashtra	09/05/25	Rs.1.50 per share(15%)Final Dividend
Laurus Labs Ltd.	09/05/25	Rs.0.80 per share(40%)Second Interim Dividend
Nakoda Group of Industries Ltd. - (NGILPP)	09/05/25	Second and Final Call of Rs. 10/- (Rs.4/- Face Value +Rs. 6/- Premium)
Navkar Urbanstructure Ltd.	09/05/25	Stock Split from Rs.2/- to Re.1/-
Shantai Industries Ltd.	09/05/25	Stock Split from Rs.10/- to Rs.2/-
Transformers & Rectifiers (India) Ltd.	09/05/25	Rs.0.20 per share(20%)Final Dividend

Bulk Deal As On 07/05/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539598	CGFL	PIYUSH SECURITIES PVT LTD	S	357860	23.71
526546	CHOKSILA	ALANKIT IMAGINATIONS LIMITED	B	44500	118
526546	CHOKSILA	PSR WEALTH ADVISORS LLP	S	44776	118
512361	CUPIDALBV	NOVARATHANMALPRAVEENKUMAR	B	4994	85.41
539770	DARJEELING	NIGHTINGALE GROWTH	B	43950	32.24
512441	ENBETRD	ALKABEN PRADIPKUMAR SHAH	S	3299749	0.76
512441	ENBETRD	ALKABEN PRADIPKUMAR SHAH	B	782722	0.83
537707	ETT	JAYESH AMRATLAL SHAH	S	210000	15.99
513309	GOLKONDA	MIKY KIRTIKUMAR SHAH	S	192900	8.27
513309	GOLKONDA	RAMESH CHEPURI	B	26688	8.99
513309	GOLKONDA	RENU TAYAL	B	50000	8.1
523277	GVFILM	SHUBHAM ASHOKBHAI PATEL	S	16658902	0.4
539692	IFINSER	SHAILESH DHAMELIYA	S	79995	18.87
540134	IISL	INFINIX CAPITAL ADVISORS PRIVATE LIMITED	B	40000	6.9
544160	JAYKAILASH	AJAY JAMNALAL PUJARA	B	32000	71
544160	JAYKAILASH	NEEL NARENDRABHAI PUJARA	S	33600	70.87
531778	KACHCHH	KARTIK BATHLA	B	28000	32.96
540360	LLFICL	EURONEX TRADE PRIVATE LIMITED	S	4000000	6.2
514060	MARKOBENZ	HIMAXI RAKESHBHAI PATEL	B	100000	10.97
542724	MURAE	ALKABEN PRADIPKUMAR SHAH	S	4700000	1.19
542724	MURAE	ALKABEN PRADIPKUMAR SHAH	B	4700000	1.24
542724	MURAE	GAUTAM RAJ	S	20000000	1.18
542724	MURAE	JNSP TRADING LLP	S	6400000	1.18
542724	MURAE	JNSP TRADING LLP	B	7200000	1.29
542724	MURAE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	9220131	1.22
542724	MURAE	SAKET KUMAR	B	25000000	1.18
538452	QUASAR	UMA SHANKAR EXIM PRIVATE LIMITED	S	9308035	0.82
542146	SKIFL	CHHAYA GAURANG SHAH	S	100000	50
543924	SONALIS	KEJRIWAL HOLDINGS	B	12000	62.26
544392	SPINAROO	HEMA LAKSHMAN	B	40000	78.83
539117	SUJALA	PROGNOSIS SECURITIES PVT. LTD.	B	35000	57
539117	SUJALA	PRRSAAR COMMODITIES PRIVATE LIMITED	S	34990	56.27
539117	SUJALA	SUNAYANA INVESTMENT COMPANY LIMITED	S	37902	57.36
539117	SUJALA	SUNAYANA INVESTMENT COMPANY LIMITED	B	31071	58.01
544381	SUPERIRON	SHUBHAM FINANCIAL SERVICES	S	156000	33.18
530217	SWOJAS	PARTHRAJSINH HARSHADSINH RANA	S	2100000	21.65
530217	SWOJAS	PIYUSH VINODRAI PAREKH	B	1201000	21.62
521005	TITANIN	SHREYA DHEERAJ JAIN	S	168000	11.8

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AGARWALTUF	Agarwal Tough Glass Ind L	AJAYKUMAR NATAVARLAL SANGANI	BUY	240000	140.87
ARUNAYA	Arunaya Organics Limited	MEENA CHOUDHARY	SELL	200000	31.04
ARUNAYA	Arunaya Organics Limited	MERU INVESTMENT FUND PCC- CELL 1	SELL	558000	31.6
ARUNAYA	Arunaya Organics Limited	TRADEDEAL FINANCIAL SERVICES PRIVATE LIMITED	BUY	90000	30.1
ARUNAYA	Arunaya Organics Limited	ZAVERI UDAY	BUY	100000	31.25
DHARIWAL	Dhariwalcorp Limited	JIGNESH AMRUTLAL THOBHANI	SELL	177600	108.49
DHARIWAL	Dhariwalcorp Limited	MEET SHAH	BUY	79200	108.45
DHARIWAL	Dhariwalcorp Limited	VASANTKUMAR DHANJIBHAI SHAH	BUY	74400	108.45
GAYAHWS	Gayatri Highway s Limited	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	1500000	1.03
GAYAHWS	Gayatri Highway s Limited	SPARROW ASIA DIVERSIFIED OPPORTUNITIES FUND	SELL	1707916	1.03
INDSWFTLAB	Ind-Swift Labs Ltd.	WILSON HOLDINGS PRIVATE LIMITED	SELL	727503	70.56
IITL	Industrial Inv Trust Ltd	HANUMAN FORGING AND ENGINEERING PRIVATE LIMITED	BUY	294000	170
IITL	Industrial Inv Trust Ltd	MULTITECH GLOBAL ENTERPRISE	BUY	288000	170
IITL	Industrial Inv Trust Ltd	ONE EARTH CAPITAL LIMITED	SELL	880035	170
IITL	Industrial Inv Trust Ltd	SYSTEMATIX FINVEST PRIVATE LIMITED	BUY	235000	170
OLIL	Oneclick Logistics Ind L	GRSM MINERALS & METALS LLP	BUY	49200	164.52
TECHERA	TechEra Engineer (Ind) L	SARABPREET KAUR	BUY	84000	120

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