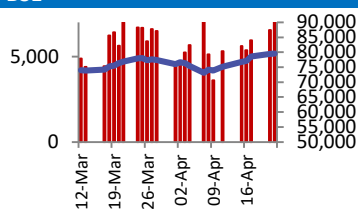
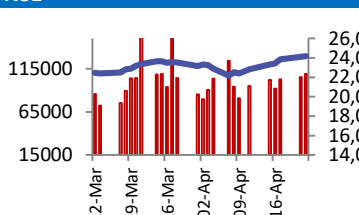


BSE	NSE																												
 <table> <tr><td>Open</td><td>79728</td></tr> <tr><td>High</td><td>79824</td></tr> <tr><td>Low</td><td>79253</td></tr> <tr><td>Close</td><td>79596</td></tr> <tr><td>Change</td><td>187</td></tr> <tr><td>Volume (Lacs)</td><td>7098</td></tr> <tr><td>Turnover (Rs.inCr)</td><td>7028</td></tr> </table>	Open	79728	High	79824	Low	79253	Close	79596	Change	187	Volume (Lacs)	7098	Turnover (Rs.inCr)	7028	 <table> <tr><td>Open</td><td>24185</td></tr> <tr><td>High</td><td>24243</td></tr> <tr><td>Low</td><td>24072</td></tr> <tr><td>Close</td><td>24167</td></tr> <tr><td>Change</td><td>42</td></tr> <tr><td>Volume(Lacs)</td><td>41710</td></tr> <tr><td>Turnover(Rs.in Cr)</td><td>109084</td></tr> </table>	Open	24185	High	24243	Low	24072	Close	24167	Change	42	Volume(Lacs)	41710	Turnover(Rs.in Cr)	109084
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World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	39187	38170	1017	2.7%
Dow Futures	39815	39357	458	1.2%
Nasdaq	16300	15871	430	2.7%
FTSE	8329	8276	53	0.6%
Nikkei	34809	34221	588	1.7%
Hang Seng	21997	21562	434	2.0%
Gift Nifty	24368	24177	191	0.8%
Straits Singapore	3827	3795	31	0.8%
South Korea	2522	2487	36	1.4%
Taiwan	19524	18793	730	3.9%
Shanghai	3299	3300	(1)	0.0%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9385	9369	16	0.2%
Alumin (\$/MT)	2402	2380	22	0.9%
Zinc (\$/MT)	2627	2596	31	1.2%
Brent Crude (\$/bbl)	68	67	0	0.5%
Gold (\$/Ounce)	3344	3381	(37)	-1.1%
Silver (\$/Ounce)	33	33	0	0.4%
Light Crude (\$/bbl)	64	64	0	0.5%
N G (\$/mmbtu)	3	3	0	0.7%
Sugar (\$/MT)	506	499	7	1.4%
Rubber (Rs./kg)	198	198	0	0.0%
Baltic Dry Index	1261	1261	0	0.0%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	85.20	85.14	0.07%
Rs./ Euro	97.89	98.30	-0.42%
Rs./Chinese Yuan	11.66	11.66	0.03%
Yen / \$ rate	141.91	141.57	0.24%
\$ US/Euro	1.14	1.14	-0.17%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.14	98.92	0.22%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24100	55240
Support 2	24000	55000
Resistance	24340	55940

Securities in Ban For Trade	
RBLBANK	MANAPPURAM

Market Review

US: Dow surged more than 1,000 points Tuesday, erasing losses incurred the day before as word spread from President Trump's administration that the trade war with China is expected to ease.

Asia: Asia-Pacific markets climbed Wednesday, after all three key benchmarks on Wall Street advanced overnight on optimism that U.S.-China trade tensions could ease.

India: Domestic indices Nifty 50 and Sensex extended their rally for the sixth consecutive session on April 22, albeit on a more muted note compared to the bumper gains recorded during this winning streak. **Nifty is expected to open on a gap up note and likely to witness positive move during the day.**

Global economy: The American Petroleum Institute (API) has released its weekly report on US crude stock levels, revealing a significant decrease in inventory. The report showed an actual decrease of 4.565 mn barrels, a figure that far surpasses previous forecasts. Analysts had predicted a much smaller decline based on the previous week's data, which showed an increase of 2.4 mn barrels. The substantial drop in crude inventories indicates a stronger demand for crude oil than was previously anticipated.

Japanese manufacturing activity shrank for the tenth consecutive month in April as new orders declined at the steepest rate in over a year amid U.S. tariff concerns, preliminary PMI data showed. The au Jibun Bank manufacturing PMI came in at 48.5 in April, below the forecast of 48.7. It was slightly higher compared to March's contraction of 48.4. A PMI print below 50 entails contraction, with Japan's manufacturing PMI shrinking for the tenth consecutive month in April.

Commodities: Oil prices extended gains in Asian trading on Wednesday as the U.S. imposed fresh sanctions on Iran amid ongoing nuclear talks, while investors assessed a weekly report showing a large decline in U.S. crude stockpiles.

Gold prices surged to hit a new record high Tuesday, buoyed by sustained safe-haven appeal over elevated U.S.-China trade tensions, and concerns around President Donald Trump's plan to overhaul the Fed Reserve.

Currency: The U.S. dollar edged higher Tuesday, but remained not far above its recent three-year low after President Trump criticized Fed Reserve Chairman Powell, threatening the independence of the U.S. central bank.

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	65126	10949	66191	11184	(235)	212887	36515	210440	36002	2447	513
Index Option	7078848	1227460	7102412	1231456	(3996)	3529213	622416	3254748	573000	274465	49416
Stock Future	2187225	137184	2194341	136943	241	6128679	383372	6009849	374552	118830	8820
Stock Option	1374814	92744	1382694	93446	(702)	1792420	111619	1730102	106896	62318	4723
Total	10706013	1468337	10745638	1473029	(4692)	11663199	1153922	11205139	1090450	458060	63472

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
11-Apr-25		18259	20611	(2352)
15-Apr-25		25738	18939	6798
16-Apr-25		15379	11353	4026
17-Apr-25		17997	13680	4317
21-Apr-25		11654	9905	1750
Month to date- Apr		164969	175669	(10700)
FII (Prov.) (Rs Cr)		Buy	Sell	Net
15-Apr-25		25103	19038	6066
16-Apr-25		15287	11350	3936
17-Apr-25		18210	13542	4668
21-Apr-25		11712	9742	1970
22-Apr-25		16703	15412	1290
Month to date-Apr		190301	207012	(16711)
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
15-Apr-25		11260	13211	(1952)
16-Apr-25		11066	13579	(2513)
17-Apr-25		13774	15780	(2006)
21-Apr-25		15620	15373	247
22-Apr-25		15154	16040	(886)
Month to date-Apr		186368	165889	20479
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
11-Apr-25		5703	2839	2864
15-Apr-25		4814	3819	995
16-Apr-25		2715	4112	(1397)
17-Apr-25		1095	1366	(272)
21-Apr-25		3227	3244	(18)
Month to date- Apr		39415	60465	(21050)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2459	60%	1836	62%
Decline	1526	37%	1058	36%
Unchanged	145	4%	68	2%

Market Turnover	22-Apr	21-Apr	Var (%)
BSE Cash	7028	6556	7%
NSE Cash	109084	105396	3%
NSE Futures	362600	368620	-2%
NSE Options	13458658	14409165	-7%
Total (Rs.Cr)	13937371	14889737	-6%

Volatility Index	22-Apr	21-Apr
Volatility Index	15.23	15.52

Index PE - TTM	22-Apr	Yr. High	Yr. Low
Sensex	22.2	25.2	20.3
Nifty	22.0	24.4	19.6

Corporate News
Bharti Airtel to Acquire 400 MHz Spectrum in 26 GHz Band from Adani Data Networks

Bharti Airtel Ltd. and its subsidiary Bharti Hexacom Ltd. have entered into definitive agreements with Adani Data Networks Ltd., a unit of Adani Enterprises Ltd., to acquire rights to use of 400 MHz of spectrum in the 26 GHz band. (NDTV)

Gensol engineering dues at Rs 307 cr, exploring all action, options, says PFC

PFC is pursuing action to recover ₹307 cr from Gensol Engineering, which faces scrutiny from SEBI for fund diversions. PFC sanctioned ₹633 cr in 2023 for EVs, disbursing ₹352 cr. Despite Gensol's initial regular payments, PFC invoked the Debt Service Reserve Account. (ET)

IndusInd clarifies no forensic audit by EY, bank's internal department reviewing MFI business

IndusInd Bank clarified on Tuesday that it has not appointed EY for a forensic audit, contrary to media reports. Instead, EY is assisting the bank's Internal Audit Department in reviewing certain records related to its microfinance business as part of the account finalization process. The internal review is ongoing. (ET)

Economy
India first to seal trade pact terms with Trump 2.0 as talks set to begin

India and the US have finalized terms for a Bilateral Trade Agreement, marking the Trump administration's first such framework. The US aims to address trade imbalances and open markets for American goods, focusing on tariff and non-tariff barriers. Both nations seek enhanced economic ties, covering goods, digital trade, and intellectual property rights, with negotiations set to begin soon. (ET)

Russian oil drives OPEC share in India's imports to record low, data shows

India's oil imports saw a shift in fiscal year 2024-25, with OPEC's share hitting a record low as Russian oil imports surged. Refiners favored discounted Russian crude, making Russia the top supplier for the third consecutive year. (ET)

International
Intel to announce plans to cut over 20% of staff this week- Bloomberg

Intel Corporation plans to announce job cuts covering more than 20% of its staff this week as it grapples with a growing cash crunch and weak market conditions. The move is aimed at reducing bureaucracy in the company, and is also intended to help streamline management and build a more engineering-focused culture. (Invst)

Top 5 Nifty Gainers	22-Apr	21-Apr	Var(%)
ITC	434	423	2.5%
HINDUNILVR	2399	2351	2.0%
M&M	2817	2764	1.9%
HDFCBANK	1962	1927	1.8%
JIOFIN	251	246	1.7%
Top 5 Nifty Losers	22-Apr	21-Apr	Var(%)
INDUSINDBK	788	828	-4.9%
POWERGRID	313	320	-2.3%
HEROMOTOCO	3834	3917	-2.1%
INFY	1423	1451	-1.9%
WIPRO	234	238	-1.8%

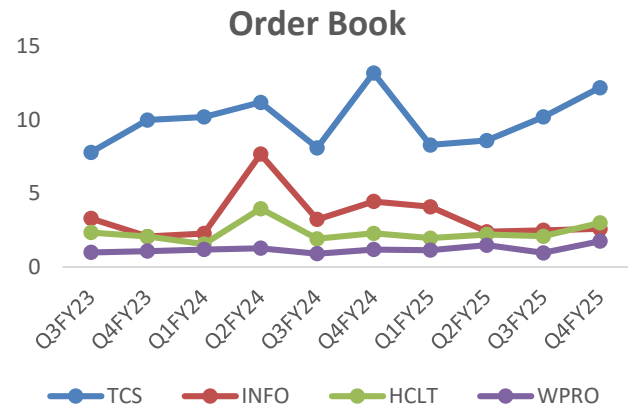
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	79596	0.2%	5.9%	3.5%	7.9%
MIDCAP	43252	0.8%	7.4%	3.4%	6.6%
SMLCAP	49143	0.8%	7.3%	3.9%	5.7%
AUTO	49071	0.3%	6.5%	0.5%	-1.4%
BANKEK	63807	0.6%	9.3%	9.7%	17.5%
Capital Goods	62190	-0.1%	6.2%	0.5%	0.1%
FMCG	20787	1.9%	3.1%	7.8%	6.9%
Health Care	42285	0.8%	4.7%	0.4%	22.3%
IT	33504	-0.6%	3.7%	-7.3%	-2.9%
METAL	29252	0.0%	5.4%	-6.2%	-3.1%
Oil & Gas	26250	-0.1%	7.0%	4.6%	-7.3%
Power	6829	-0.9%	4.8%	4.3%	-2.0%
Realty	6861	2.4%	12.1%	2.4%	-8.7%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	67768	-0.2%	-0.1%	-0.1%	-16.5%
Fresh Exposure	6023	17.2%	21.0%	11.5%	27.3%
Exposure liquidated	6146	16.6%	12.0%	13.9%	47.9%
Closing Net scripwise outstanding	67645	-0.2%	0.5%	-0.2%	-17.2%

NSE USD Futures	22-Apr	21-Apr	Var (%)
Apr Expiry (Rs./\$)	87.95	87.95	0.0%
May Expiry (Rs./\$)	85.19	85.19	0.0%
Total Turnover (Rs. Cr)	3431	4028	-15%

Sectors	TTM PE
Auto	28.82
Auto Ancillary	39.83
Banking	13.89
Engineering	50.01
Cement	74.58
Diamonds & Jewellery	42.02
Housing Finance	25.31
Infrastructure & Const	26.94
Metals-Aluminium	25.59
Metal – Steel	16.8
Oil Expl.	7.42
Pharma	9.16
Power – Gen. Supp.	38.75
Information Tech.	29.09
Sugar	18.28
Telecom Serv. Prov.	49.32
Tyres	29

Order book for Large IT Firms (Source: NBR)



10 year G-Sec Yield	Current	Previous	Change
US	4.35%	4.40%	(5) bps
Japan	1.35%	1.32%	4 bps
India	6.32%	6.32%	0 bps
UK	4.55%	4.57%	(2) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	678	678	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)	629	1296	(667.8)

IIP Growth %	Jan-25	Jan-24	Apr-Feb
IIP	5.0	4.2	4.2
Capital Goods	7.8	3.2	5.4
Mining	5.5	3.6	4.1
Manufacturing	2.4	5.6	5.2
Electricity	4.4	6.0	3.3

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	16.86	10459284	16.58	20614525	1.69%	1	1436.39	1422.80	1.0%
Wipro	2.77	11279228	2.72	9035858	1.84%	1	235.99	234.15	0.8%
Dr.Reddy's	13.88	4018324	13.67	1183496	1.54%	1	1182.51	1175.00	0.6%
ICICI Bank	34.08	8889482	33.53	7280988	1.64%	2	1451.72	1416.50	2.5%
HDFC Bank	75.18	4816425	73.77	4154327	1.91%	3	2134.99	1961.70	8.8%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	38.50	38.10	0.4	1.0%
RIL	60.40	58.40	2.0	3.4%
SBI	96.20	92.60	3.6	3.9%

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	Q4CY24	Q3CY24
Growth (QoQ Annualized)	2.40%	3.10%

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 Apr
US Inflation Data	13 May
US GDP	30 Apr
US Unemployment Data	02 May
US Fed Rate	07 May
China GDP	15 Jul
China Inflation Data	10 May

Event Update

Name	Date	Purpose
CIE Automotive India Ltd.	23/04/25	Rs.7.00 per share(70%)Final Dividend
Elantas Beck India Ltd.	23/04/25	Rs.7.50 per share(75%)Final Dividend
Schaeffler India Ltd.	23/04/25	Rs.28.00 per share(1400%)Final Dividend
AMI Organics Ltd.	25/04/25	Stock Split from Rs.10/- to Rs.5/-
Muthoot Finance Ltd.	25/04/25	Interim Dividend
Sanofi India Ltd.	25/04/25	Rs.117.00 per share(1170%)Final Dividend

Bulk Deal As On 22/04/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539091	CITL	LALIT MADHUKAR	S	4110950	1.92
543521	FONE4	NEELAM TANDON	B	100000	11.03
543521	FONE4	VIVEK KUMAR BHAUKA	S	130000	11.03
540614	GGENG	MOPPINGTOPPING TRADING PRIVATE LIMITED	S	9590000	0.84
540614	GGENG	STARLINK MANAGEMENT SERVICES PRIVATE LIMITED .	S	11870769	0.84
540134	IISL	DEEP PATEL	S	62086	7.02
539175	INDRAIND	SHAILESH DHAMELIYA	S	2000	9.48
539175	INDRAIND	SHAILESH DHAMELIYA	B	63430	8.87
524614	INDXTRA	AMBASSADOR INTRA HOLDINGS LTD.	B	1060000	4.7
534623	JUPITERIN	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRIVATE LIMITED	S	55540	64.15
534623	JUPITERIN	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRIVATE LIMITED	B	55540	63.1
502937	KESORAMIND	MUNDHRA HOMES PRIVATE LIMITED	S	3257000	3.23
500240	KINETICENG	KIRAN ANIL SHAH	B	162889	186.63
500240	KINETICENG	RELIANCE CORPORATE ADVISORY SERVICES LIMITED	S	203585	186.16
539767	MNIL	SHALU KATARIA	B	20353	19.9
543207	NATURAL	HEMA JAYPRAKASH BHAVSAR	S	200630	11.55
543207	NATURAL	JYOTI SINGH	S	246423	11.75
543207	NATURAL	RIDDHI TRADERS	S	117195	12.04
543207	NATURAL	RIDDHI TRADERS	B	147195	11.82
543400	OMNIPOTENT	ASHOK DILIPKUMAR JAIN	B	36000	7.05
540198	OSIAJEE	DEEPIKA HARISH JAIN	S	64461	167.04
530095	PRADHIN	TEUDDY TECHNOLOGY PRIVATE LIMITED	B	8204421	0.46
530111	RAJPACK	NARENDRA VENIGOTA	B	78878	32.26
530111	RAJPACK	NATARAJ VEERESHAPPA ANGADI	S	24477	32.35
530111	RAJPACK	RAJSHRI CHOUDHARY	S	50000	32.5
544236	RAL	PLUTUS CAPITAL MANAGEMENT LLP	B	30000	59.68
512097	SAICOM	ABDURRAHMAN MOHD SHAFI TAIBANI	S	1200000	0.38
543970	SHOORA	DARSHANSINGH	S	9000	64.84
544392	SPINAROO	MAYURI SHRIPAL VORA	B	36000	73.58
544392	SPINAROO	VISHALA HITESH LOONIA	S	50000	73.58
540914	SRUSTEELS	MONEYPLANT GOLD & JEWELLERY TRADING L.L.C	B	2500000	4.67
540914	SRUSTEELS	SUCCESS MERCHANTS PRIVATE LIMITED	B	1100000	4.67
540914	SRUSTEELS	SYLPH TECHNOLOGIES LIMITED	S	3700000	4.67
530217	SWOJAS	DIMPAL YOGESHBHAI PANCHAL	S	192677	18.16
530217	SWOJAS	PIYUSH VINODRAI PAREKH	B	727000	18.5
530217	SWOJAS	VICKY RAJESH JHAVERI	S	250001	18.5
521005	TITANIN	APPLE EQUIFIN PVT LTD	S	280	13.3
521005	TITANIN	APPLE EQUIFIN PVT LTD	B	199373	13.36
542803	VEL	BHAVIN KANJIBHAI CHARIA	B	46000	13

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
BTML-RE1	Bodhi Tree Multimedia Ltd	MARWADI SHARES AND FINANCE LTD.	SELL	437351	0.11
BTML-RE1	Bodhi Tree Multimedia Ltd	SHAMSEER	SELL	396797	0.12
CPS	C P S Shapers Limited	GIRISH SAREEN	BUY	19800	625
DIVINEHIRA	Divine Hira Jewellers Ltd	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	121600	54.38
KKJEWELS	Kabra Jewels Limited	NECTA BLOOM VCC - NECTA BLOOM ONE	SELL	71000	140
KESORAMIND	KESORAM INDUSTRIES L	MUNDHRA HOMES PRIVATE LIMITED	SELL	5337000	3.01
NAVKAURB	Navkar Urbanstructure Ltd	NEXPACT LIMITED	BUY	2000000	13.5
NITCO	Nitco Limited	KAMATH ASSOCIATES	BUY	812137	120
NITCO	Nitco Limited	SETU SECURITIES PRIVATE LIMITED	SELL	1400000	120.02
OLIL	Oneclick Logistics Ind L	BHASKAR NARMADASHANKAR OZA	SELL	24000	165.35
RAPIDFLEET	Rapid Fleet Mgt Service L	MLB STOCK BROKING PRIVATE LIMITED	SELL	37200	205.45
RKDL	Ravi Kumar Distilleries	KALI RAM GUPTA	SELL	133897	33.98
RBLBANK	RBL Bank Limited	BRITISH INTERNATIONAL INVESTMENT PLC	SELL	23198729	184.74
SELAN	Selan Exploration Technol	BNP PARIBAS FINANCIAL MARKETS	BUY	78607	576.8
STALLION	Stallion Ind Fluorochem L	ASHIKA GLOBAL SECURITIES PRIVATE LIMITED	SELL	552471	72
STALLION	Stallion Ind Fluorochem L	CRAFT EMERGING MARKET FUND PCC- CITADEL CAPITAL FUND	SELL	552471	72
STALLION	Stallion Ind Fluorochem L	NEOMILE CORPORATE ADVISORY LIMITED	BUY	1490878	71.99
STALLION	Stallion Ind Fluorochem L	NEOMILE GROWTH FUND - SERIES I	BUY	1000000	72
VOLERCAR	Voler Car Limited	GIRIJADHAVA VYAPAAR PRIVATE LIMITED	SELL	457600	98.71
VOLERCAR	Voler Car Limited	M PRASAD & CO LIMITED	BUY	500800	98.11

Disclosure:

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