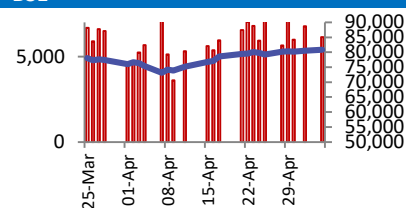
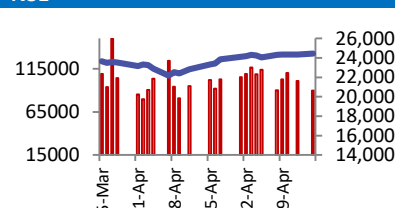


BSE



Open	80662
High	81049
Low	80658
Close	80797
Change	295
Volume (Lacs)	5970
Turnover (Rs.inCr)	6132

NSE



Open	24420
High	24526
Low	24401
Close	24461
Change	114
Volume(Lacs)	29372
Turnover(Rs.in Cr)	89885

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	41219	41317	(99)	-0.2%
Dow Futures	41294	41319	(25)	-0.1%
Nasdaq	17844	17978	(133)	-0.7%
FTSE	8596	8497	100	1.2%
Nikkei	36831	36831	Closed	Closed
Hang Seng	22623	22505	118	0.5%
Gift Nifty	24573	24561	12	0.0%
Straits Singapore	3854	3853	0	0.0%
South Korea	2560	2560	Closed	Closed
Taiwan	20562	20533	29	0.1%
Shanghai	3302	3279	23	0.7%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9366	9206	160	1.7%
Alumin (\$/MT)	2432	2416	16	0.6%
Zinc (\$/MT)	2608	2578	30	1.2%
Brent Crude (\$/bbl)	61	60	1	1.5%
Gold (\$/Ounce)	3361	3334	27	0.8%
Silver (\$/Ounce)	33	32	1	1.6%
Light Crude (\$/bbl)	58	57	1	1.5%
N G (\$/mmbtu)	4	4	0	1.3%
Sugar (\$/MT)	490	494	(4)	-0.8%
Rubber (Rs./kg)	196	198	(2)	-1.0%
Baltic Dry Index	1421	1411	10	0.7%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	84.26	84.55	-0.34%
Rs./ Euro	95.56	95.96	-0.42%
Rs./Chinese Yuan	11.65	11.59	0.54%
Yen / \$ rate	143.81	143.70	0.08%
\$ US/Euro	1.13	1.13	-0.07%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.86	99.83	0.03%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24400	54870
Support 2	24340	54600
Resistance	24540	55340

Securities in Ban For Trade	
RBLBANK	MANAPPURAM

Market Review

US: The S&P 500 fell to snap its longest streak of gains in 20 years on Monday as investors assessed U.S. President Donald Trump's latest tariff announcement ahead of the Federal Reserve's monetary policy decision later this week.

Asia: Asian markets opened on a steady note Tuesday, posting marginal gains as trading resumed after an extended weekend.

India: Benchmark indices ended at their highest closing level for 2025 on May 5, buoyed by recent foreign institutional inflows and an improved sentiment driven by declining crude oil prices.

Market is expected to open on a flattish note and likely to witness range bound move during the day.

Global economy: China's services sector grew at a slower-than-expected pace in April, as per private PMI data, as businesses grappled with increased disruptions from a bitter trade war with the United States. The Caixin China Services PMI fell to 50.7 in April from 51.9 in March, missing expectations of 51.7.

Activity in the U.S. services sector grew by more than anticipated in April, in a sign of potential resilience in an industry that is a major driver of the overall economy despite potential trade-related headwinds. The Institute for Supply Management's non-manufacturing PMI climbed slightly to 51.6 last month, up from a previous reading of 50.8. Economists had anticipated the number would fall to 50.2.

Hong Kong's freight forwarding industry is reeling from the U.S.-China trade war with 41% of container capacity from the city to North America's west coast cancelled for the week starting May 12, the South China Morning Post reported. Hong Kong, a global shipping hub which plays a key role in re-exporting goods, is likely to see a huge economic hit, the SCMP reported, quoting Joyce Tai, executive vice-president for worldwide partnerships at freight booking platform Freightos.

Commodities: Oil steadied after hitting four-year lows in the previous session that was driven by an OPEC+ decision to accelerate output increases, stoking fears of oversupply at a time when U.S. tariffs have spurred concerns about demand.

Gold prices climbed to a one-week high on Tuesday as rising concerns over U.S. President Trump's tariff plans boosted safe-haven demand, while investors also kept a close tab on the upcoming Federal Reserve policy meeting.

Currency: The dollar struggled to make headway on Tuesday as an unprecedented two-day surge in its Taiwanese counterpart spilled over to other regional peers and highlighted the fragility of the U.S. currency.

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	20493	3589	17818	3058	531	163805	28411	161620	27695	2185	716
Index Option	5266254	954624	5465085	990377	(35753)	2637572	472897	2257156	402049	380416	70848
Stock Future	328940	20299	280670	17494	2805	5948314	374289	5957963	370856	(9649)	3433
Stock Option	830565	54935	848329	56278	(1343)	1040828	65140	982912	60634	57916	4506
Total	6446252	1033447	6611902	1067207	(33760)	9790519	940737	9359651	861234	430868	79503

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
25-Apr-25		18713	13673	5040
28-Apr-25		11684	9174	2510
29-Apr-25		15694	13343	2351
30-Apr-25		25357	25184	173
2-May-25		18050	15244	2807
Month to date- May		18050	15244	2807
FII (Prov.) (Rs Cr)		Buy	Sell	Net
28-Apr-25		11680	9206	2474
29-Apr-25		15674	13289	2386
30-Apr-25		25190	25139	51
2-May-25		18130	15360	2770
5-May-25		9366	8868	498
Month to date-May		27496	24228	3268
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
28-Apr-25		14436	11619	2818
29-Apr-25		13356	11987	1369
30-Apr-25		14430	12638	1792
2-May-25		13906	10616	3290
5-May-25		13918	11129	2789
Month to date-May		27824	21745	6079
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
25-Apr-25		1960	2852	(893)
28-Apr-25		1354	4265	(2911)
29-Apr-25		1186	3607	(2422)
30-Apr-25		3134	4949	(1816)
2-May-25		1618	1317	301
Month to date- May		1618	1317	301

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2520	60%	1996	68%
Decline	1503	36%	879	30%
Unchanged	179	4%	77	3%

Market Turnover	05-May	02-May	Var (%)
BSE Cash	6132	6770	-9%
NSE Cash	89885	100895	-11%
NSE Futures	104685	138809	-25%
NSE Options	11981529	14095922	-15%
Total (Rs.Cr)	12182231	14342396	-15%

Volatility Index	05-May	02-May
Volatility Index	18.34	18.26

Index PE - TTM	05-May	Yr. High	Yr. Low
Sensex	22.5	25.2	20.3
Nifty	22.0	24.4	19.6

Corporate News
Paras Defence signs MoU with Israel's HevenDrones to form JV for defence logistics drones

Defence engineering company, Paras Defence and Space Technologies Ltd, has signed a Memorandum of Understanding (MoU) with Israel-based HevenDrones Ltd to explore opportunities in the defence and civil drone markets. (CNBC)

Shell, Reliance & ONGC JV completes India's first offshore facilities decommissioning project

A JV, including Shell, Reliance Industries Ltd, and ONGC, has successfully completed India's first offshore decommissioning project. The Tapti field, ceasing production in 2016, saw the safe removal of its mid and south facilities in the Arabian Sea. This project, involving multiple stakeholders, sets a benchmark for future offshore energy transitions in India. (ET)

IRCON bags ₹187-cr contract for rural industrial park in Kerala

State-owned engineering and construction firm, IRCON International Ltd, has secured a work order worth ₹187.08 cr (excluding GST) from Kerala State IT Infrastructure Ltd (KSITIL) for the construction of a dedicated rural industrial park in Thiruvananthapuram district. (CNBC)

Economy
Share of gold in India's forex reserves doubles in four years, central bank report shows

RBI reports a significant increase in gold reserves. The share of gold in forex reserves has doubled since 2021. As of March-end, gold constitutes 11.70% of the total reserves. The central bank holds 879.59 metric tonnes of gold. Most of the gold is stored domestically. A portion is kept with the Bank of England and BIS. (ET)

India offers zero-for-zero tariffs on auto parts, steel from US

India has proposed eliminating tariffs on steel, auto components, and pharmaceuticals for a specific import quantity in trade negotiations with the US. Beyond that threshold, standard duties would apply. This offer aims to expedite a bilateral trade deal expected by fall, prioritizing certain sectors before the end of the US tariff pause. (ET)

International
Waymo partners with Magna for new vehicle factory in Arizona

Alphabet's self-driving unit Waymo plans to build Jaguar I-PACE and Zeekr vehicles with its autonomous technology at a new plant in Arizona as soon as this year, with Canadian auto parts supplier partner Magna International. (Invst)

Top 5 Nifty Gainers	05-May	02-May	Var(%)
ADANIENT	2456	2294	7.0%
ADANIPTS	1347	1267	6.3%
TRENT	5371	5148	4.3%
SHRIRAMFIN	629	604	4.1%
BAJAJFINSV	2026	1958	3.5%
Top 5 Nifty Losers	05-May	02-May	Var(%)
KOTAKBANK	2085	2185	-4.6%
JSWSTEEL	956	973	-1.8%
ONGC	239	243	-1.7%
SBIN	790	800	-1.3%
DRREDDY	1171	1183	-1.0%

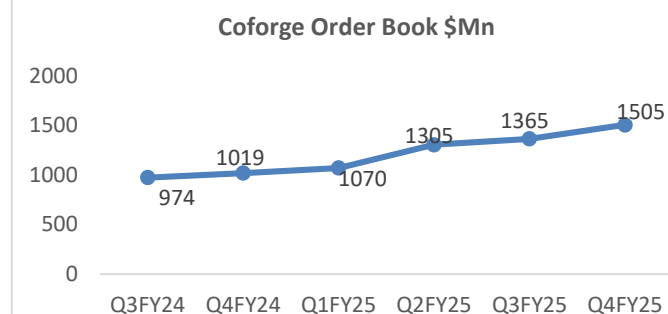
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	80797	0.4%	2.0%	7.2%	9.3%
MIDCAP	43327	1.4%	1.9%	7.0%	3.1%
SMLCAP	47950	1.2%	-0.1%	4.5%	2.7%
AUTO	50866	1.9%	3.3%	10.3%	-1.1%
BANKEX	62148	-0.9%	-0.2%	5.1%	11.9%
Capital Goods	63201	0.8%	2.8%	6.0%	1.6%
FMCG	20659	1.2%	0.6%	5.9%	4.9%
Health Care	42380	0.9%	1.2%	4.6%	18.5%
IT	35337	0.4%	1.3%	6.8%	3.6%
METAL	28934	0.2%	-0.2%	1.7%	-8.4%
Oil & Gas	27195	2.0%	5.6%	12.2%	-4.7%
Power	6677	1.4%	-0.2%	3.3%	-7.6%
Realty	6870	0.6%	3.1%	7.7%	-11.5%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	69173	0.4%	-0.5%	1.6%	-11.8%
Fresh Exposure	4650	-7.6%	-16.9%	0.2%	2.7%
Exposure liquidated	4838	1.4%	-10.6%	32.0%	-4.4%
Closing Net scripwise outstanding	68984	-0.3%	-1.0%	-0.1%	-11.4%

NSE USD Futures	05-May	02-May	Var (%)
Apr Expiry (Rs./\$)	87.00	87.25	-0.3%
May Expiry (Rs./\$)	87.56	87.00	0.6%
Total Turnover (Rs. Crore)	3076	4435	-31%

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

Coforge Ltd. Order Book USD \$ Mn (Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.34%	4.31%	3 bps
Japan	1.26%	1.26%	1 bps
India	6.33%	6.35%	(3) bps
UK	4.51%	4.48%	3 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)	1597	1597	(0.2)

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	17.85	5659491	17.88	8940503	-0.17%	1	1504.04	1508.60	-0.3%
Wipro	2.90	3773771	2.90	4549420	0.00%	1	244.35	243.57	0.3%
Dr.Reddy's	13.87	1243434	14.00	1236714	-0.93%	1	1168.69	1171.30	-0.2%
ICICI Bank	34.14	3114808	34.18	4178054	-0.12%	2	1438.32	1429.40	0.6%
HDFC Bank	73.58	1576971	73.59	1475994	-0.01%	3	2066.62	1936.80	6.7%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	39.55	39.35	0.2	0.5%
RIL	67.20	65.80	1.4	2.1%
SBI	94.40	93.40	1.0	1.1%

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 Jun
US Fed Rate	07 May
China GDP	15 Jul
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 05/05/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
543499	ACHYUT	KHODEEAR ENTERPRISE LLP LLP	B	1575000	3.48
511463	ALEXANDER	SALIM SIRAJ KHUNT	S	53992	14.64
511463	ALEXANDER	SALIM SIRAJ KHUNT	B	101	14.82
543211	BONLON	SYLPH TECHNOLOGIES LIMITED	S	113464	40.36
543211	BONLON	SYLPH TECHNOLOGIES LIMITED	B	53661	40.02
512361	CUPIDALBV	NOVARATHANMALPRAVEENKUMAR	B	7273	94.36
512441	ENBETRD	TEUDDY TECHNOLOGY PRIVATE LIMITED	S	3300000	0.85
512441	ENBETRD	TEUDDY TECHNOLOGY PRIVATE LIMITED	B	50364	0.84
532825	JAGJANANI	SAMIR JAVERI	B	100011	9.3
502937	KESORAMIND	HDFC LIFE INSURANCE COMPANY LIMITED	S	1850000	4.01
540360	LLFICL	BIRFORD ENTERPRISES PRIVATE LIMITED	S	10000000	6.5
530805	OIVL	SHARE INDIA SECURITIES LIMITED	S	197387	1.29
543400	OMNIPOTENT	ASHOK DILIPKUMAR JAIN	B	170000	9.81
543400	OMNIPOTENT	SURAJADIGA	S	146000	9.81
539143	PANTH	FINGROW INVESTMENT VENTURES PRIVATE LIMITED .	S	150000	7.89
539143	PANTH	FINGROW INVESTMENT VENTURES PRIVATE LIMITED .	B	150000	7.89
511116	QUADRANT	ISHAAN TRADEFIN LLP	S	3085449	0.37
511116	QUADRANT	ISHAAN TRADEFIN LLP	B	355148	0.38
538452	QUASAR	AVENUE BUSINESS CENTER PRIVATE LIMITED	S	21790000	0.8
544236	RAL	INFINIX CAPITAL ADVISORS PRIVATE LIMITED	S	1200	74.5
544236	RAL	INFINIX CAPITAL ADVISORS PRIVATE LIMITED	B	14400	77.22
543256	RFLL	HINABEN ALTAFBHAI LAKHANI	S	56777	26.49
543256	RFLL	JIGNESH SURESH MODI	B	200000	26.4
538520	SBL	KARTIKBATHLA	S	240000	2.44
538520	SBL	NIMISHA KRUNAL THESIA	B	320893	2.44
539584	SIPTL	SETU SECURITIES PVT. LTD.	S	3412722	0.51
539117	SUJALA	SUNAYANA INVESTMENT COMPANY LIMITED	S	29336	60.41
539117	SUJALA	SUNAYANA INVESTMENT COMPANY LIMITED	B	31526	59.91
532070	SUMUKA	PARVINDER SINGH	B	36677	183.34
543745	SVS	MITESH BHARATKUMAR PAVANI	B	312000	15.2
543745	SVS	NILESH DHIRAJLAL HEMANI	S	354000	15.2
531499	SYBLY	TUTUGUCHHAIT	B	65000	4.98
531499	SYBLY	VISAGAR FINANCIAL SERVICES LIMITED	S	64260	4.98
513307	SYNTHFO	RAVINDRA MARUVADA	S	13658	183.9
513307	SYNTHFO	RUCHIRA GOYAL	B	10000	183.9

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AGIL	Agi Infra Limited	CHUNGATH KARUNAKARAN PADMA KUMAR	BUY	200885	840
AGIL	Agi Infra Limited	TRADE CORNER	SELL	125000	840
AGSTRA	AGS Transact Tech Ltd	ISHAAN TRADEFIN LLP	SELL	902235	4.91
AKG	AKG Exim Limited	MANISH KUMAR HUF	BUY	172282	12.95
AKG	AKG Exim Limited	MSB E TRADE SECURITIES LIMITED	SELL	172282	12.95
KESORAMIND	KESORAM INDUSTRIES L	HDFC LIFE INSURANCE COMPANY LIMITED	SELL	2035305	4
MOS	Mos Utility Limited	L7 HITECH PRIVATE LIMITED	BUY	200000	287.75
MOS	Mos Utility Limited	RAJASTHAN GASES LIMITED	BUY	150000	291
OLIL	Oneclick Logistics Ind L	DEV HASMUKHBHAI KAPADIYA	BUY	24000	164.05
OLIL	Oneclick Logistics Ind L	GRSM MINERALS & METALS LLP	BUY	44400	166.58
OLIL	Oneclick Logistics Ind L	PARTH NITINBHAI SINOJIA	BUY	24000	164.05
OLIL	Oneclick Logistics Ind L	SHARE INDIA SECURITIES LIMITED	SELL	115200	164.17
SHANTI	Shanti Overseas (Ind) Ltd	SUMITKUMAR JAGDISHCHANDRA THAKKAR	BUY	85000	14.35
UTKARSHBNK	Utkarsh Small Fin Bank L	FOUR DIMENSIONS SECURITIES (INDIA) LTD.	BUY	9090971	24.12
VIPULLTD	Vipul Limited	MONEYPLANT GOLD & JEWELLERY TRADING L.L.C	BUY	2100000	11.47
VIPULLTD	Vipul Limited	NAVIN KUMAR GUPTA	SELL	1800000	11.47
VIPULLTD	Vipul Limited	RAKSHAN SINGHAL	SELL	1000000	11.48
VIPULLTD	Vipul Limited	RUCHI GUPTA	SELL	1636000	11.47
VIPULLTD	Vipul Limited	USHA BAID	BUY	2948770	11.48

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