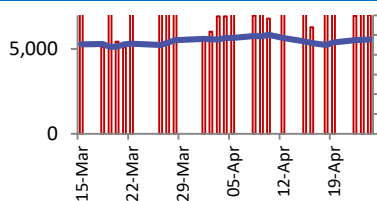
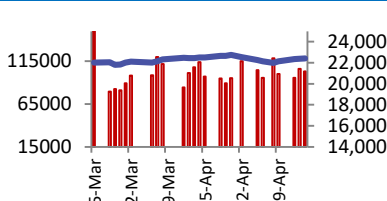


**BSE**



80,C	Open	73958
75,C	High	74122
65,C	Low	73789
55,C	Close	73853
	Change	114
	Volume (Lacs)	9506
	Turnover (Rs.inCr)	7021

**NSE**



	Open	22422
	High	22476
	Low	22384
	Close	22402
	Change	34
	Volume(Lacs)	49531
	Turnover(Rs.in Cr)	103161

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	38461	38504	(43)	-0.1%
Dow Futures	38602	38680	(78)	-0.2%
Nasdaq	15713	15697	16	0.1%
FTSE	8040	8045	(5)	-0.1%
Nikkei	37818	38460	(642)	-1.7%
Hang Seng	17356	17201	155	0.9%
Gift Nifty	22356	22420	(64)	-0.3%
Straits Singapore	3281	3293	(12)	-0.4%
South Korea	2649	2676	(27)	-1.0%
Taiwan	19954	20132	(178)	-0.9%
Shanghai	3049	3045	4	0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9810	9774	36.0	0.4%
Alumin (\$/MT)	2581	2603	(22.0)	-0.8%
Zinc (\$/MT)	2807	2805	2.0	0.1%
Brent Crude (\$/bbl)	88.0	88.0	0.0	0.0%
Gold (\$/Ounce)	2321	2316	5.0	0.2%
Silver (\$/Ounce)	27.0	27.0	0.0	0.0%
Light Crude (\$/bbl)	83.0	83.0	0.0	0.0%
N G (\$/mmbtu)	2.0	2.0	0.0	0.0%
Sugar (\$/MT)	577.0	573.0	4.0	0.7%
Rubber (Rs./kg)	179.5	180.3	(0.8)	-0.4%
Baltic Dry Index	1774	1804	(30.0)	-1.7%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	83.32	83.34	-0.02%
Rs./ Euro	89.03	88.84	0.21%
Rs./Chinese Yuan	11.50	11.50	0.00%
Yen / \$ rate	155.42	155.35	0.05%
\$ US/Euro	1.07	1.07	0.00%

Dollar Index	Current	Previous	Var(%)
Dollar Index	105.26	105.28	-0.02%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22340	48000
Support 2	22250	47770
Resistance	22500	48300

Securities in Ban For Trade	
ABFRL	HINDCOPPER
SAIL	

**Market Review**

**US:** US equity markets ended mixed Wednesday as new orders for durable goods increased more than expected.

**Asia:** Asia-Pacific markets took a breather after two straight days of rallies, mirroring moves on Wall Street ahead of first-quarter GDP figures from the U.S. due Thursday.

**India:** Indian shares declined for a second day in a row on Wednesday with benchmark Sensex dropping by 535 points owing to selling in HDFC Bank and IT shares amid weak global trends. **Markets are expected to open on a flattish note and likely to remain sideways move during the day.**

**Global Economy:** Sales of new U.S. single-family homes rebounded in March from Feb's downwardly revised level, drawing support from a persistent shortage of previously owned houses on the market, but momentum could be curbed by a resurgence in mortgage rates. The report from the Commerce Department showed the median house price jumped to a seven month-high from Feb, likely as fewer builders offered price cuts and sales shifted to higher priced homes. Rising prices and mortgage rates could make housing even more unaffordable, especially for first-time buyers.

The South Korean economy grew at the fastest pace in more than two years in the first quarter beating all estimates with a pick-up in domestic consumption and robust exports, but the market questioned if the recovery was sustainable. GDP for the Jan-March quarter was 1.3% higher than the preceding three months on a seasonally adjusted basis, the sharpest expansion since the fourth quarter of 2021.

**Commodities:** Gold prices were stuck in a tight range on Thursday as investors looked to U.S. economic data for further clarity on the Federal Reserve's interest rate path.

Oil prices eased in early trade on Thursday as concerns about a potential slowdown in the U.S. economy amid prospects for delayed interest rate cuts outweighed worries over the risk of expanding conflict in the Middle East.

**Currency:** EUR/USD hovers around the 1.0700 psychological level on Thursday during the early Asian session. The modest uptick of the major pair is supported by the softer US Dollar.

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

Contracts	Purchase		Sell		Net	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value	Value	Contract	Value	Contract	Value	Contract	Value
Index Future	70879	6351	90463	8609	(2258)	335913	33818	347131	34052	(11218)	(234)
Index Option	37298525	2965876	37748396	2994696	(28820)	3208506	329875	4693265	434770	(1484759)	(104895)
Stock Future	1000254	83981	954123	80028	3953	3204604	265581	3225983	267081	(21379)	(1500)
Stock Option	258479	23088	252366	22599	489	303024	25932	363429	31065	(60405)	(5133)
<b>Total</b>	<b>38628137</b>	<b>3079296</b>	<b>39045348</b>	<b>3105932</b>	<b>(26636)</b>	<b>7052047</b>	<b>655206</b>	<b>8629808</b>	<b>766968</b>	<b>(1577761)</b>	<b>(111762)</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
16-Apr-24	10994	14258	(3265)
18-Apr-24	18545	22708	(4163)
19-Apr-24	16861	16089	773
22-Apr-24	13322	15941	(2619)
23-Apr-24	15040	18499	(3458)
<b>Month to date-Apr</b>	<b>227702</b>	<b>234802</b>	<b>(7100)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
18-Apr-24	18231	22492	(4260)
19-Apr-24	16286	16156	129
22-Apr-24	13190	16105	(2915)
23-Apr-24	14931	17976	(3045)
24-Apr-24	10243	12755	(2512)
<b>Month to date-Apr</b>	<b>209977</b>	<b>240678</b>	<b>(30701)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
18-Apr-24	14274	11988	2286
19-Apr-24	9397	9449	(53)
22-Apr-24	11856	8313	3543
23-Apr-24	12338	9419	2919
24-Apr-24	12601	8791	3810
<b>Month to date-Apr</b>	<b>198077</b>	<b>166536</b>	<b>31541</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
16-Apr-24	1304	4668	(3363)
18-Apr-24	1742	4324	(2582)
19-Apr-24	1516	2336	(819)
22-Apr-24	1721	777	945
23-Apr-24	753	2629	(1876)
<b>Month to date-Apr</b>	<b>29939</b>	<b>37863</b>	<b>(7924)</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2228	57%	1564	59%
Decline	1594	41%	984	37%
Unchanged	107	3%	90	3%

Market Turnover	24-Apr	23-Apr	Var (%)
BSE Cash	7021	7110	-1%
NSE Cash	103161	106029	-3%
NSE Futures	323057	317368	2%
NSE Options	40391312	33738739	20%
Total (Rs.Cr)	40824551	34169247	19%

Volatility Index	24-Apr	23-Apr
Volatility Index	10.28	10.20

Index PE - TTM	24-Apr	Yr. High	Yr. Low
Sensex	24.8	26.0	22.2
Nifty	22.6	28.8	20.3

**Corporate News**

**ASK Automotive, AISIN Group enter into JV for passenger car segment**

As part of the collaboration, the two partners will market and sell the auto components in "independent after markets for passenger car production". The pact is subject to regulatory approvals and is anticipated to be completed in the coming months. With this strategic collaboration, both companies aim to expand their footprints across India, Nepal, Sri Lanka, and Bangladesh for independent aftermarket in the segment. (ET)

**GAIL plans to expand LNG trading business to global markets**

GAIL plans to double its LNG trading volume by 2030. "We plan to ramp up our LNG trading business. We began with sourcing LNG cargoes for ourselves and have expanded to sourcing cargoes for some other Indian companies. Now we plan to serve non-Indian customers as well, with an aim to become a global LNG trader," GAIL chairman and MD said. (ET)

**Invesco agrees to pay Rs 5 cr to SEBI for settlement in MF violation case**

Invesco Asset Management (India), its CEO and four others have settled a matter with SEBI related to alleged violations of mutual fund and portfolio management norms. The AMC and others have settled the matter by jointly paying Rs 4.98 cr under Sebi's settlement mechanism. The market regulator has received an undertaking that systems have been put in place to prevent the recurrence of similar lapses. (BS)

**Economy**

**Pharma exports rise around 10% to \$27.9 bn**

The country's drugs and pharmaceuticals exports increased 9.67 per cent yoy to \$27.9 bn in FY24, even as the total exports dipped by 3 per cent in the last fiscal. Pharma exports in March grew by 12.73 per cent to \$2.8 bn. The top five export markets, for the sector during the last fiscal, are the US, the UK, the Netherlands, the UK, South Africa and Brazil. The US accounts for over 31 per cent of India's total pharma exports, followed by the UK and Netherlands (about 3 per cent each). (BS)

**International**

**Clinical lab operator Labcorp to buy bankrupt genetic test maker Invitae for \$239 million**

Laboratory service provider Labcorp will acquire Softbank-backed Invitae Corp's assets auctioned through a voluntary bankruptcy protection process. Labcorp will acquire all of the bankrupt firm's assets on a going concern basis for \$239 million in cash consideration and other non-cash consideration. (Reuters)

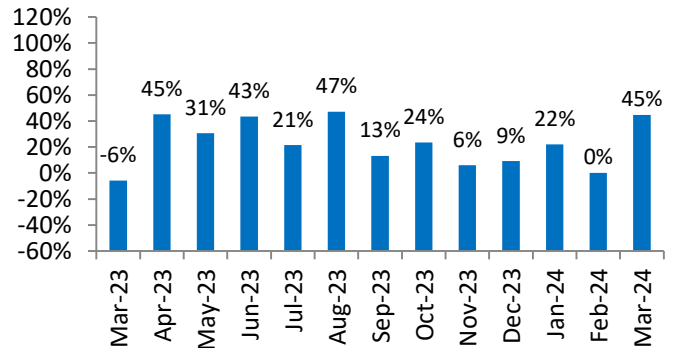
Top 5 Nifty Gainers	24-Apr	23-Apr	Var(%)
HINDALCO	636	612	4.0%
CIPLA	1398	1347	3.8%
JSWSTEEL	883	851	3.7%
TATASTEEL	166	161	2.7%
POWERGRID	290	285	1.8%
Top 5 Nifty Losers	24-Apr	23-Apr	Var(%)
TATACONSUM	1110	1173	-5.4%
GRASIM	2338	2370	-1.4%
TECHM	1186	1200	-1.2%
HDFCLIFE	594	601	-1.2%
TCS	3831	3875	-1.1%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	73853	0.2%	1.2%	1.4%	22.8%
MIDCAP	40957	0.9%	1.6%	5.6%	64.1%
SMLCAP	46859	0.8%	3.2%	9.6%	65.1%
AUTO	49804	0.1%	1.0%	3.2%	67.7%
BANKEX	54605	0.5%	1.6%	2.8%	12.8%
Capital Goods	62705	0.9%	2.5%	6.8%	76.7%
FMCG	19464	0.1%	1.3%	0.9%	14.8%
Health Care	34942	1.0%	-0.2%	1.3%	53.9%
IT	34274	-0.6%	-0.4%	-4.3%	27.9%
METAL	31056	2.8%	3.0%	11.6%	55.2%
Oil & Gas	28599	1.0%	0.1%	5.3%	58.0%
Power	7006	0.5%	0.8%	7.2%	90.8%
Realty	7578	0.8%	2.6%	9.7%	119.9%

NSE USD Futures	24-Apr	23-Apr	Var (%)
April Expiry (Rs./\$)	83.32	83.35	0.0%
May Expiry (Rs./\$)	83.11	83.11	0.0%
Total Turnover (Rs. Crore)	14185	13804	3%

Sectors	TTM PE
Auto	31.74
Auto Ancillary	45.4
Banking	16.04
Engineering	40.48
Cement	78.93
Diamonds & Jewellery	46.05
Housing Finance	20.07
Infrastructure & Const	30.18
Metals-Aluminium	39.82
Metal - Steel	17.69
Oil Expl.	20.83
Pharma	12.95
Power – Gen. Supp.	45.81
Information Tech.	21.95
Sugar	14.93
Telecom Serv. Prov.	84.42
Tyres	25.85

VST Tillers Monthly Volume Growth (YoY) (Source: Company Data)



10 year G-Sec Yield	Current	Previous	Change
US	4.65%	4.64%	1 bps
Japan	0.89%	0.91%	(2) bps
India	7.19%	7.17%	2 bps
UK	4.33%	4.24%	9 bps
Libor 3 Mths	5.59%	5.58%	1 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation - WPI	0.53%	0.20%	33 bps
Inflation - CPI	4.85%	5.09%	(24) 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)	-1202	-1302	99.4

IIP Growth %	Jan-24	Jan-23	Apr-Feb
IIP	5.7	6.0	6.2
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 24/04/24**

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
512149	AVANCE	CAMELLIA TRADEX PRIVATE LIMITED	S	2454922	0.93
512149	AVANCE	CAMELLIA TRADEX PRIVATE LIMITED	B	23597583	0.91
512149	AVANCE	TOPGAIN FINANCE PRIVATE LIMITED	S	20500000	0.91
512149	AVANCE	TOPGAIN FINANCE PRIVATE LIMITED	B	1000000	0.87
543209	BILLWIN	SHUBHSUKI VENTURES PRIVATE LIMITED	B	12000	91.12
526546	CHOKSILA	ZAKI ABBAS NASSER	B	37325	62.23
543651	DAPS	SANGEETA SHETALBHAI SHAH	B	28000	34.4
543651	DAPS	SHRIPAL V VORA HUF	S	28000	34.4
543595	EPBIO	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	S	9500	145
543595	EPBIO	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	S	15000	140.28
544156	GCONNECT	SANJAY POPATLAL JAIN	S	30000	41.1
544156	GCONNECT	VAXFAB ENTERPRISES LIMITED	B	96000	42.62
513309	GOLKONDA	ARUN JAIN	B	50000	18.04
513309	GOLKONDA	GRID TRADING PRIVATE LIMITED	S	300000	17.32
513309	GOLKONDA	SHUBHAM ASHOKBHAI PATEL	S	235498	17.81
513309	GOLKONDA	SHUBHAM ASHOKBHAI PATEL	B	237250	17.31
513309	GOLKONDA	SONIKA JAIN	B	55100	18.81
530663	GOYALASS	AJAIDAS KALLATTU CHANDRADAS	S	250000	1.89
530663	GOYALASS	VANDANATIWARI	B	315770	1.89
513337	GUJTLRM	HEMALBEN SANJAY SHAH	S	297698	31.12
544163	GVL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	45000	109.96
539697	HILIKS	MRIDUL TRIPATHI	S	40000	37.39
504731	IBRIGST	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	12000	145.9
504731	IBRIGST	SHAUNAK JAGDISH SHAH	B	20000	145.9
504731	IBRIGST	SITA JAIN	S	34500	145.9
536709	INDRENEW	NITIN SHARMA	S	100000	17.75
539005	JAYATMA	MANUBHAI SHANTILAL SHAH	S	165000	16.95
539005	JAYATMA	NISA FAMILY TRUST	B	165000	16.95
504076	JYOTI	SHAH SHARAD KANAYALAL	S	90000	81.87
505523	MAHACORP	SHUBHAM ASHOKBHAI PATEL	S	8919196	0.91
540727	POOJA	KIFS ENTERPRISE	B	115000	55.84
543805	RESGEN	PRAFFUL AGARWAL	S	126000	98.16
517447	RSSOFTWARE	GUTTIKONDA VARA LAKSHMI	B	250000	286.7
530025	SAMYAKINT	SUSILA DEVI BOMMISSETTI	S	105129	31.43
531982	SPECFOOD	SHAH SHARAD KANAYALAL	S	39184	29.65
544035	SPL	VARSHABEN JIGNESHKUMAR THOBHANI	B	100800	74.09
543799	SVJ	RAJU HARIHARAN	S	39000	25.55
531334	VIKALPS	ACHINTYA SECURITIES PVT. LTD.	S	35598	27.7
544157	VRUDDHI	ASHWIN STOCKS AND INVESTMENT PRIVATE LIMITED	S	50000	147.37
544157	VRUDDHI	RAJESH TRIPATHI	B	16000	147
544157	VRUDDHI	STOCK VERTEX VENTURES	B	24000	161.3
539337	WAAREE	CAMELLIA TRADEX PRIVATE LIMITED	S	56000	1994.69
522209	YOGISUNG	FAISALSHAIKH	S	100000	6.38
522209	YOGISUNG	FAISALSHAIKH	B	12500	7
522209	YOGISUNG	VANDANA BAJAJ	B	100000	6.38

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ANZEN	Anzen Ind Ene Yld Plu Tru	EDELWEISS BROKING LIMITED	BUY	1600000	101.8
ANZEN	Anzen Ind Ene Yld Plu Tru	LARSEN & TOUBRO LIMITED	SELL	1600000	101.8
ATALREAL	Atal Realtech Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	465376	10.25
CYIENTDLM	Cyient DLM Limited	BNP PARIBAS FINANCIAL MARKETS	SELL	703051	740.78
DELHIVERY	Delhivery Limited	AMERICAN FUND INSURANCE A/C AMERICAN INSURANCE SERIES GLOBAL SMALL CAPITALISATION FUND	BUY	2110711	444.3
DELHIVERY	Delhivery Limited	CANADA PENSION PLAN INVESTMENT BOARD	SELL	20450000	444.3
DELHIVERY	Delhivery Limited	CANADA PENSION PLAN INVESTMENT BOARD	SELL	20450000	444.3
DELHIVERY	Delhivery Limited	FIDELITY INTERNATIONAL DISCOVERY COMMINGLED POOL	BUY	227800	444.3
DELHIVERY	Delhivery Limited	FIDELITY INVESTMENT TRUST A/C. FIDELITY SOUTHEAST ASIA FUND F351	BUY	282700	444.3
DELHIVERY	Delhivery Limited	FIDELITY INVESTMENT TRUST FIDELITY INTERNATIONAL DISCOVERY K6 FUND	BUY	203400	444.3
DELHIVERY	Delhivery Limited	FIDELITY MANAGEMENT AND RESEARCH CO. A/C FIDELITY FAR EAST FUND	BUY	73900	444.3
DELHIVERY	Delhivery Limited	FIDELITY MANAGEMENT AND RESEARCH CO A/C FIDELITY INVESTMENT TRUST FIDELITY INT DISCOVERY FUND	BUY	2843400	444.3
DELHIVERY	Delhivery Limited	FIDELITY MGT AND RESEARCH CO. A/C FIDELITY ADVISOR SERIES VIII : FIDELITY ADVISOR EMERGING ASIA FUND	BUY	118800	444.3
DELHIVERY	Delhivery Limited	HSBC COLLECTIVE INVESTMENT TRUST HSBC INDIA MULTI INCOME FUND	BUY	4769	444.3
DELHIVERY	Delhivery Limited	HSBC GLOBAL INVESTMENT FUNDS INDIAN EQUITY	BUY	174693	444.3
DELHIVERY	Delhivery Limited	HSBC INDIA INFRASTRUCTURE EQUITY MOTHER FUND (HSBC GLOBAL) (HK1018480)	BUY	378762	444.3
DELHIVERY	Delhivery Limited	HSBC INDIAN EQUITY FUND (HSBC GLOBAL ) (SG1020932/CANADA)	BUY	2623	444.3
DELHIVERY	Delhivery Limited	HSBC INDIEN	BUY	60587	444.3
DELHIVERY	Delhivery Limited	SMALLER CAP WORLD FUND INC (35 SCWF/000035)	BUY	13819289	444.3
DELHIVERY	Delhivery Limited	SMALLER CAP WORLD FUND INC (35 SCWF/000035)	BUY	13819289	444.3
DELHIVERY	Delhivery Limited	THE MASTER TRUST BANKER JAPAN LTD A/C HSBC INDIAN EQUITY MOTHER FUND (HK0991950)	BUY	148566	444.3
GLOBE	Globe Textiles (I) Ltd.	AVANCE VENTURES PRIVATE LIMITED	SELL	9030753	3.61
GLOBE	Globe Textiles (I) Ltd.	INTERTICK DEVELOPERS PRIVATE LIMITED	BUY	7457451	3.62
HOMESFY	Homesfy Realty Limited	JMKD BROKING PRIVATE LIMITED	SELL	15900	851.86
INNOVATIVE	Innovative Tyres & Tubes	MOHAMMEDI Q KHOKHAWALA	SELL	90000	6.69
JYOTI-RE	Jyoti Structures Ltd	RAJTARU ENTERPRISES	BUY	592574	7.51
LAXMICOT	Laxmi Cotspin Limited	PAREKH HASMUKH	BUY	100000	34.98
LIBAS	Libas Consu Products Ltd	ASHAPURA COMMODITIES	BUY	200000	19.95
LIBAS	Libas Consu Products Ltd	JAINAM BROKING LIMITED	SELL	200000	19.95
LLOYDS	Lloyds Luxuries Limited	AUTHUM INVESTMENT & INFRASTRUCTURE LIMITED	BUY	600000	97
LLOYDS	Lloyds Luxuries Limited	PUNE IT SPACE SOLUTIONS PRIVATE LIMITED	SELL	600000	97
NAMAN	Naman In-Store (India) L	VORA FINANCIAL SERVICES PVT LTD	SELL	59200	119.4
ONELIFECAP	Onelife Cap Advisors Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	75000	16.9
PRUDMOULI	PrudentialSugar-Roll Sett	PILOT CONSULTANTS PVT LTD	SELL	303144	24.75
RSSOFTWARE	R. S. Software (I) Ltd.	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	250000	269.6
RATNAVEER	Ratnaveer Precision Eng L	ABHAY MAL LODHA	SELL	270000	140.65
SHRADHA	Shradha Infraprojects Ltd	ANUJ SHANTILAL BADIATE	SELL	304204	78.63
SIGNORIA	Signoria Creation Limited	MERU INVESTMENT FUND PCC-CELL 1	SELL	36000	160
STEELCITY	Steel City Securities Lim	NG FAMILY TRUST	BUY	144393	97.16
SUMEETINDS	Sumeet Ind Limited	ESAAR (INDIA) LIMITED	SELL	1889057	2.1
TGL	Teerth Gopicon Limited	MANSI SHARE AND STOCK ADVISORS PVT LTD	SELL	115200	167.35
TGL	Teerth Gopicon Limited	NEETU BAFNA	SELL	72000	167.35
TGL	Teerth Gopicon Limited	VORA FINANCIAL SERVICES PVT LTD	BUY	60000	167.35
YUKEN	Yuken India Limited	BLA FINANCE & INVESTMENT COMPANY	BUY	158320	1021.38
YUKEN	Yuken India Limited	GKK CAPITAL MARKETS PRIVATE LIMITED	SELL	131000	1021.9

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