

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	39594	40608	(1015)	-2.5%
Dow Futures	39582	39797	(215)	-0.5%
Nasdaq	16387	17125	(738)	-4.3%
FTSE	7913	7679	234	3.0%
Nikkei	33148	34609	(1461)	-4.2%
Hang Seng	20581	20682	(101)	-0.5%
Gift Nifty	22933	22487	446	2.0%
Straits Singapore	3502	3578	(76)	-2.1%
South Korea	2416	2445	(29)	-1.2%
Taiwan	19215	19000	215	1.1%
Shanghai	3212	3224	(11)	-0.3%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8962	8988	(26)	-0.3%
Alumin (\$/MT)	2365	2370	(5)	-0.2%
Zinc (\$/MT)	2635	2641	(6)	-0.2%
Brent Crude (\$/bbl)	63	63	(0)	-0.5%
Gold (\$/Ounce)	3218	3176	42	1.3%
Silver (\$/Ounce)	31	31	0	0.0%
Light Crude (\$/bbl)	60	60	(0)	-0.3%
N G (\$/mmbtu)	4	4	(0)	-1.0%
Sugar (\$/MT)	505	499	6	1.2%
Rubber (Rs./kg)	197	198	(1)	-0.5%
Baltic Dry Index	1269	1259	10	0.8%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	86.70	86.25	0.52%
Rs./ Euro	95.75	94.19	1.66%
Rs./Chinese Yuan	11.84	11.80	0.34%
Yen /\$ rate	143.51	144.45	-0.65%
\$ US/Euro	1.13	1.12	0.97%

Dollar Index	Current	Previous	Var(%)
Dollar Index	100.21	100.87	-0.65%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22300	50140
Support 2	22000	49870
Resistance	22840	50800

Securities in Ban For Trade	
BSOFT	HINDCOPPER
MANAPPURAM	NATIONALUM

Market Review

US: U.S. stocks closed sharply lower on Thursday, wiping away some of the previous day's rally as investors digested President Donald Trump's decision to suspend some tariffs while escalating a trade war with China.

Asia: Asian markets bore the brunt of the initial reaction, opening sharply lower on Friday. Japan's Nikkei 225 was down 5.38% at 32,746.49, while South Korea's KOSPI declined 1.97% to 2,397.

India: India's benchmark equity indices snapped its one day of advance to end in the red on Wednesday after the RBI's 25 basis points rate cut failed to enthruse investors reeling under Trump tariffs. **Market is expected to open on a gap up and likely to witness sideways move during the day.**

Global economy: Donald Trump's pause on some announced import taxes may have eased the stress building in financial markets for now, but leaves in place the same set of circumstances that had reset the U.S. economic outlook with rising recession risks and potentially rising inflation. Major tariffs on China, Mexico and Canada remain in place, accounting for the bulk of U.S. imports, and the public, investors and the U.S. Federal Reserve now have three more months of uncertainty around where a disruptive debate will settle. With the stage set for a downturn in confidence that Fed officials already worry is sidelining spending and investment.

China's Commerce Minister Wang Wentao had discussions with his Saudi Arabian and South African counterparts to exchange views on responding to the U.S. reciprocal tariffs, the Chinese ministry said on Friday. The conversations took place over separate video calls on Thursday in which China discussed strengthening bilateral economic and trade cooperation with Saudi Arabia and South Africa. Wang also spoke to Saudi Arabia's Commerce Minister Majid bin Abdullah al-Qasabi about enhancing cooperation with countries within the Gulf Cooperation Council.

Commodities: Oil prices fell on Friday and were set to drop for a second week on concerns prolonged trade war between the United States and China, the world's largest economies, will crush crude consumption as their dispute curtails economic growth.

Gold prices raced to an all-time high on Friday, supported by recession concerns as escalating tariff tensions between the United States and China fuelled investor demand for safe-haven assets like bullion.

Currency: The dollar slumped on Friday as waning confidence in the U.S. economy prompted investors to ditch U.S. assets to the benefit of safe havens like the Swiss franc, yen and euro, as well as gold.

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	28288	4436	34994	5585	(1149)	203861	32250	212101	33848	(8240)	(1598)
Index Option	15049801	2519735	15596807	2611389	(91654)	2403262	391664	3535780	586335	(1132518)	(194671)
Stock Future	323129	18628	344899	19640	(1012)	5706662	330810	5694120	332444	12542	(1634)
Stock Option	920302	56655	948124	58237	(1582)	1311604	74603	1284596	73208	27008	1395
Total	16321520	2599454	16924824	2694851	(95397)	9625389	829327	10726597	1025835	(1101208)	(196508)

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
2-Apr-25	12211	13271	(1060)
3-Apr-25	9582	12540	(2959)
4-Apr-25	14210	17338	(3128)
7-Apr-25	13745	22676	(8931)
8-Apr-25	13917	18590	(4674)
Month to date- Apr	63664	84416	(20752)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
3-Apr-25	9682	12488	(2806)
4-Apr-25	13947	17431	(3484)
7-Apr-25	13372	22412	(9040)
8-Apr-25	13688	18682	(4994)
9-Apr-25	11959	16317	(4358)
Month to date-Apr	85227	117350	(32123)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
3-Apr-25	11567	11346	221
4-Apr-25	14454	16175	(1720)
7-Apr-25	26528	14406	12122
8-Apr-25	14364	11267	3097
9-Apr-25	13990	11014	2977
Month to date-Apr	105365	81536	23829
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
2-Apr-25	7734	6495	1239
3-Apr-25	2322	5741	(3419)
4-Apr-25	4511	5074	(563)
7-Apr-25	1855	11838	(9983)
8-Apr-25	3896	8049	(4153)
Month to date- Apr	20318	37198	(16880)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1445	36%	986	34%
Decline	2442	61%	1830	64%
Unchanged	143	4%	55	2%

Market Turnover	09-Apr	08-Apr	Var (%)
BSE Cash	3605	5127	-30%
NSE Cash	80977	94247	-14%
NSE Futures	105319	132385	-20%
NSE Options	36837730	16428222	124%
Total (Rs.Cr)	37027631	16659981	122%

Volatility Index	09-Apr	08-Apr
Volatility Index	21.43	22.79

Index PE - TTM	09-Apr	Yr. High	Yr. Low
Sensex	20.6	25.7	20.3
Nifty	20.4	24.4	19.6

Corporate News

Sun Pharma gets favourable order that paves way for Leqselvi's launch in America

The US Court of Appeals for the Federal Circuit has ruled in favour of the company and vacated the preliminary injunction on the launch of LEQSELVI (deuruxolitinib) in the United States, effective immediately. While litigation with Incyte Corporation continues, the preliminary injunction is no longer in effect. (MC)

GAIL (India) commissions 96.6% of Jagdishpur - Haldia - Bokaro - Dhamra Pipeline project

GAIL (India) has completed laying of over 97.6% of the integrated Jagdishpur Haldia Bokaro - Dhamra Pipeline (JHBDPL), popularly known as Pradhan Mantri Urja Ganga, carrying Natural Gas to Eastern and North-Eastern part of India. Of this, ~96.6% has been put under commercial operations. The pipeline is currently transporting 12.26 MMSCMD of natural gas to eastern and north-eastern India. (BS)

Greaves Cotton partners with Chara Technologies to manufacture motors, controllers

It has announced a partnership with Chara Tech to revolutionise the electric mobility landscape by leveraging Chara's rare-earth-free motor technology. Greaves will manufacture synchronous reluctance motors & controllers exclusively at its Shendra, Aurangabad facility. (MC)

Economy

India eyes export gains as US-China trade war opens market opportunities

A 90-day pause in reciprocal tariffs gives Indian exporters time to share added costs with buyers. With the US imposing steep tariffs on China, Indian sectors like textiles, footwear, and food see potential to gain market share. However, Chinese competition in non-US markets remains a concern. (ET)

India offers UK an EV trade-off: Luxury imports for budget exports

India has proposed unlimited EVs imports priced above GBP 80,000 from the UK to facilitate a free trade agreement. This is in exchange for a larger export quota of smaller EVs priced below GBP 40,000 from India to the UK. The proposal aims to benefit automakers in both countries and potentially influence trade discussions with the US. (ET)

International

Tesla debuts in Saudi Arabia with first showroom and service center in Riyadh

Tesla has launched operations in Saudi Arabia, showcasing its Cybertruck and Model Y. This move signals improved relations between Elon Musk and the kingdom, despite a past feud. Saudi Arabia aims for 30% EV adoption by 2030, but faces infrastructure challenges with limited charging stations. (ET)

Top 5 Nifty Gainers	09-Apr	08-Apr	Var(%)
BRITANNIA	5339	5179	3.1%
NESTLEIND	2345	2275	3.1%
HINDUNILVR	2350	2289	2.7%
TATACONSUM	1090	1070	1.9%
TITAN	3174	3122	1.7%
Top 5 Nifty Losers	09-Apr	08-Apr	Var(%)
WIPRO	237	247	-4.3%
SBIN	742	769	-3.4%
LT	3054	3161	-3.4%
TECHM	1273	1314	-3.2%
TRENT	4620	4767	-3.1%

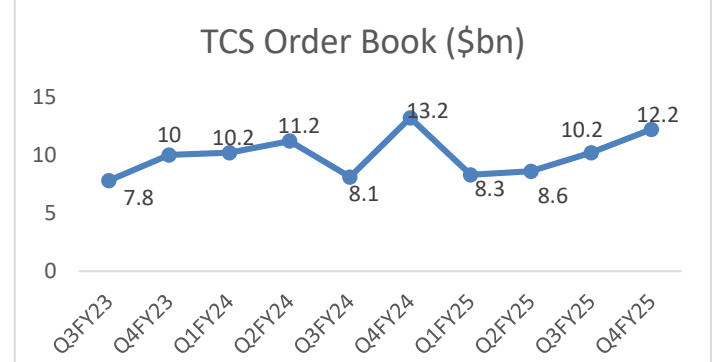
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	73847	-0.5%	-3.6%	-0.3%	-1.6%
MIDCAP	39547	-0.7%	-5.1%	-0.1%	-3.8%
SMLCAP	44446	-1.1%	-5.7%	0.3%	-3.7%
AUTO	45145	0.1%	-5.9%	-2.9%	-9.8%
BANKEKX	57488	-0.9%	-2.8%	4.5%	3.8%
Capital Goods	57315	-1.6%	-7.4%	-1.1%	-8.4%
FMCG	19948	1.5%	2.2%	5.9%	2.0%
Health Care	39563	-1.2%	-3.8%	0.6%	10.8%
IT	32022	-2.0%	-10.2%	-12.7%	-11.3%
METAL	26617	-1.4%	-13.2%	-11.6%	-12.8%
Oil & Gas	24068	-0.4%	-5.1%	1.6%	-15.9%
Power	6347	-0.5%	-3.0%	3.5%	-10.4%
Realty	6039	-2.0%	-8.9%	-6.4%	-20.2%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	68,004	-2.7%	-1.5%	-1.4%	-18.6%
Fresh Exposure	4,255	6.6%	9.6%	-1.5%	-7.0%
Exposure liquidated	4,076	-30.7%	-7.8%	1.4%	-10.2%
Closing Net scripwise outstanding	68,183	0.3%	-0.5%	-1.6%	-18.5%

NSE USD Futures	09-Apr	08-Apr	Var (%)
Apr Expiry (Rs./\$)	86.82	86.82	0.0%
May Expiry (Rs./\$)	86.98	86.98	0.0%
Total Turnover (Rs. Cr)	3871	3471	12%

Sectors	TTM PE
Auto	27.83
Auto Ancillary	38.46
Banking	13.37
Engineering	48.27
Cement	69.13
Diamonds & Jewellery	40.86
Housing Finance	24.62
Infrastructure & Const	26.62
Metals-Aluminium	25.19
Metal – Steel	16.67
Oil Expl.	7.58
Pharma	8.59
Power – Gen. Supp.	37.69
Information Tech.	27.95
Sugar	17.78
Telecom Serv. Prov.	45.62
Tyres	26.72

TCS OrderBook (Source Company)



10 year G-Sec Yield	Current	Previous	Change
US	4.45%	4.42%	3 bps
Japan	1.36%	1.35%	1 bps
India	6.44%	6.48%	(3) bps
UK	4.64%	4.78%	(14) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	665	665	0.0%
Inflation - WPI	2.38%	2.31%	7 bps
Inflation - CPI	3.61%	4.26%	(65) 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)	1443	1474	(31.7)

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	16.98	25884800	17.66	20797808	-3.85%	1	1472.12	1403.70	4.9%
Wipro	2.84	9172349	2.89	11722692	-1.73%	1	246.22	236.65	4.0%
Dr.Reddy's	12.71	3042428	13.02	4324220	-2.38%	1	1101.93	1094.05	0.7%
ICICI Bank	30.80	5902213	31.25	7622285	-1.44%	2	1335.14	1300.80	2.6%
HDFC Bank	65.03	2596278	65.66	3733316	-0.96%	3	1879.31	1765.00	6.5%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	36.20	35.15	1.1	3.0%
RIL	55.40	54.00	1.4	2.6%
SBI	87.50	85.50	2.0	2.3%

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%	4.60%
Inflation – CPI (%)	-0.10%	-0.70%

Economic Calendar

	Date
Indian GDP Data	30 May
Indian Inflation Data CPI	14 Apr
Indian Inflation Data WPI	15 Apr
Indian Monetary Policy	06 Jun
India's Industrial Production (IIP)	28 Apr
US Inflation Data	To be announced
US GDP	30 Apr
US Unemployment Data	02 May
US Fed Rate	07 May
China GDP	16 Apr
China Inflation Data	10 May

Event Update

Name	Date	Purpose
Ashiana Housing Ltd.	11/04/25	Rs.1.00 per share(50%)Interim Dividend
Enbee Trade & Finance Ltd.	11/04/25	Stock Split from Rs.10/- to Re.1/-
CRISIL Ltd.	14/04/25	Rs.26.00 per share(2600%)Final Dividend
Kapil Raj Finance Ltd.	15/04/25	Stock Split from Rs.10/- to Re.1/-
Akme Fintrade (India) Ltd.	18/04/25	Stock Split from Rs.10/- to Re.1/-
Ranjeet Mechatronics Ltd.	21/04/25	Stock Split from Rs.10/- to Rs.5/-

Bulk Deal As On 09/04/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
543211	BONLON	SRU STEELS LIMITED	S	108122	35.89
543211	BONLON	SRU STEELS LIMITED	B	157497	36.02
543211	BONLON	VIBHU BANSAL	B	100000	35.84
539091	CITL	VARDIP GLOBSTRAT TRADING PRIVATE LIMITED	S	942391	1.8
544387	DESCO	ASHWIN STOCKS AND INVESTMENT PRIVATE LIMITED	S	45000	211.81
543516	DHYAANITR	BHAVIN INDRAJIT PARIKH	B	151200	12.9
521137	EUREKAI	BINDU KUMAR MISHRA HUF	B	59000	11
521137	EUREKAI	CHINTAN NAYAN BHAI RAJYAGURU	S	91775	11
521137	EUREKAI	HARDEEP SINGH	S	56278	10.45
521137	EUREKAI	RANJANA VINOD SHUKLA	B	77501	10.51
521137	EUREKAI	SHIVAM	B	55090	10.98
531913	GOPAIST	RAMESHRAVI	B	60000	9
540134	IISL	ASODARIYA SAMIR RAMJIBHAI	B	76480	6.05
539175	INDRAIND	SHAILESH DHAMELIYA	B	60974	8.91
544270	KGVL	ARYAMAN BROKING LIMITED	S	48000	54
544270	KGVL	ARYAMAN BROKING LIMITED	B	57600	51.34
544270	KGVL	SOMANI VENTURES AND INNOVATIONS LIMITED	S	63600	51.07
526490	PRATIK	MAHENDRA UTTAM KAPSE	S	350000	6.72
526490	PRATIK	NAVNEET SOMANI (HUF)	S	500000	6.51
531930	SARTHAKIND	ARAV HOUSING & PROPERTY DEVELOPERS PRIVATE LIMITED	B	73509	27.58
531930	SARTHAKIND	PROMISE SECURITIES PRIVATE LIMITED	S	68483	27.4
532217	SIELFNS	NARENDER PAL SINGH	B	78999	12.2
532217	SIELFNS	NIRANJANA JAYSUKHLAL DOSHI	B	65795	11.72
540914	SRUSTEELS	ANJU GUPTA	B	480000	4.09
531190	TAVERNIER	AKHILUNNAM	B	36187	55
531190	TAVERNIER	SILVERSTONE CONSULTANCY SERVICES PRIVATE LIMITED	S	100000	55.01
531190	TAVERNIER	VENKATESWARLU KOKKULA	B	40500	55
534755	TRIOMERC	VANDANA NARESH RUNGTA	S	650000	0.81
542803	VEL	DOLLY VISHAL SHAH	S	47500	13
514378	YARNSYN	NINJA SECURITIES PRIVATE LIMITED	B	20113	17.3

NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
ABIN-RE1	A B Infrabuild Ltd	B.W.TRADERS	SELL	100000	37.62
ABIN-RE1	A B Infrabuild Ltd	NIRAJ RAJNIKANT SHAH	BUY	163499	38.38
ATCENERGY	ATC Energies System Ltd	NOVA GLOBAL OPPORTUNITIES FUND PCC - TOUCHSTONE	SELL	232800	80.96
CGRAPHICS	Creative Graphics S Ind L	CAPRI GLOBAL HOLDINGS PRIVATE LIMITED	SELL	222400	138
DIVINEHIRA	Divine Hira Jewellers Ltd	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	134400	43.75
IRISDOREME	Iris Clothings Limited	STELLAR IR ADVISORS PRIVATE LIMITED	SELL	880000	44.61
JALAN	Jalan Transolu. India Ltd	PARTHA PRATIM ROYCHOWDHURY	SELL	213000	12.4
KAMDHENU	Kamdhenu Ispat Limited	NITESH SHASHIKANT KHATATE	BUY	2300000	26
KESORAMIND	KESORAM INDUSTRIES L	ISHAAN TRADEFIN LLP	SELL	1588973	3.89
NORTHARC	Northern Arc Capital Ltd	360 ONE SPECIAL OPPORTUNITIES FUND - SERIES 2	SELL	590645	173.9
NORTHARC	Northern Arc Capital Ltd	360 ONE SPECIAL OPPORTUNITIES FUND - SERIES 3	SELL	2073855	173.9
NORTHARC	Northern Arc Capital Ltd	360 ONE SPECIAL OPPORTUNITIES FUND - SERIES 3	SELL	2073855	173.9
NORTHARC	Northern Arc Capital Ltd	ASHISH DHAWAN	BUY	3500000	173.9
NORTHARC	Northern Arc Capital Ltd	ASHISH DHAWAN	BUY	3500000	173.9
NORTHARC	Northern Arc Capital Ltd	DVARA TRUST	SELL	835500	173.9
NORTHARC	Northern Arc Capital Ltd	DVARA TRUST	SELL	835500	173.9
UFO	UFO Moviez India Ltd.	NKSQUARED	SELL	260008	61.98

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