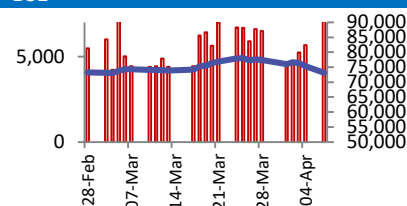
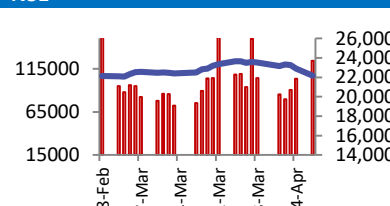


## BSE



Open	71450
High	73404
Low	71425
Close	73138
Change	-2227
Volume (Lacs)	7263
Turnover (Rs.inCr)	8462

## NSE



Open	21758
High	22254
Low	21744
Close	22162
Change	-743
Volume(Lacs)	46361
Turnover(Rs.in Cr)	124335

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	37966	38315	(349)	-0.9%
Dow Futures	38914	38165	749	2.0%
Nasdaq	15603	15588	15	0.1%
FTSE	7702	8055	(353)	-4.4%
Nikkei	33031	31137	1894	6.1%
Hang Seng	20322	19828	494	2.5%
Gift Nifty	22659	22320	339	1.5%
Straits Singapore	3473	3541	(67)	-1.9%
South Korea	2357	2328	29	1.2%
Taiwan	18360	19232	(872)	-4.5%
Shanghai	3115	3097	18	0.6%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8800	8732	68	0.8%
Alumin (\$/MT)	2384	2371	14	0.6%
Zinc (\$/MT)	2617	2615	3	0.1%
Brent Crude (\$/bbl)	65	64	1	1.5%
Gold (\$/Ounce)	3002	2983	19	0.6%
Silver (\$/Ounce)	30	30	0	0.2%
Light Crude (\$/bbl)	62	61	1	1.7%
N G (\$/mmbtu)	4	4	0	0.2%
Sugar (\$/MT)	521	527	(6)	-1.1%
Rubber (Rs./kg)	200	205	(5)	-2.4%
Baltic Dry Index	1401	1489	(88)	-5.9%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	85.84	85.24	0.71%
Rs./ Euro	94.10	93.64	0.49%
Rs./ Chinese Yuan	11.71	11.73	-0.13%
Yen / \$ rate	147.33	147.84	-0.34%
\$ US/Euro	1.10	1.09	0.55%

Dollar Index	Current	Previous	Var(%)
Dollar Index	102.90	103.26	-0.35%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22200	49200
Support 2	21700	48700
Resistance	22570	51500

Securities in Ban For Trade	
BSOFT	HINDCOPPER
MANAPPURAM	

## Market Review

**US:** US stock market closed mostly lower on Monday amid heightened volatility, weighed down by growing concerns over a potential economic slowdown and rising inflation due to President Donald Trump's tariff policies.

**Asia:** Asian markets faced heightened volatility Tuesday on concerns that President Donald Trump's trade war is risking global economic growth.

**India:** India's benchmark equity indices hit a 10-month low and ended with losses on Monday, extending declines for the third straight session. **Market is expected to open on a gap up and likely to witness positive move during the day.**

**Global economy:** China decried as blackmail on Tuesday U.S. President Donald Trump's threat to add a further tariff of 50% on its goods, after he demanded that Beijing withdraw its plans for counter-tariffs. If neither side blinks and Trump sticks to his plans, total new levies could climb to 104% this year on Chinese goods imported into the United States, escalating a trade war that has already spurred the biggest market losses since the pandemic.

Japan's Economy Minister Ryosei Akazawa has been appointed as trade negotiator with the U.S., the government's top spokesperson. Bilateral discussions on exchange-rate moves will continue to be managed by Japan's finance minister and the U.S. treasury secretary, Chief Cabinet Secretary Yoshimasa Hayashi told a news conference. Japanese PM Shigeru Ishiba is considering another visit to the U.S. for discussions with U.S. President Donald Trump at the most appropriate timing, with progress in ministerial-level talks being a key consideration.

**Commodities:** Oil prices rose more than 1% on Tuesday, rebounding after a hefty selloff in recent sessions led by concerns that U.S. tariffs might depress demand and lead to a global recession.

Gold prices edged higher on Tuesday from a near four-week low reached in the previous session, as heightened concerns over the global trade war between the United States and its key trading partners lifted demand for safe-haven assets.

**Currency:** The safe havens yen and Swiss franc held near six-month highs on Tuesday while the U.S. dollar nursed broad losses as financial markets grappled with mounting recession worries in the wake of President Donald Trump's sweeping tariffs.

**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	57828	9114	78851	12449	(3335)	216449	34014	206276	33404	10173	610
Index Option	7623760	1285829	7520934	1271196	14633	3038596	494742	2722580	458701	316016	36041
Stock Future	551313	30340	503884	28479	1861	5704119	327573	5672868	337365	31251	(9792)
Stock Option	1648934	99955	1561675	93772	6183	1217771	68317	1112216	63569	105555	4748
<b>Total</b>	<b>9881835</b>	<b>1425238</b>	<b>9665344</b>	<b>1405896</b>	<b>19342</b>	<b>10176935</b>	<b>924646</b>	<b>9713940</b>	<b>893039</b>	<b>462995</b>	<b>31607</b>

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
27-Mar-25		28676	20555	8121
28-Mar-25		26270	32606	(6336)
2-Apr-25		12211	13271	(1060)
3-Apr-25		9582	12540	(2959)
4-Apr-25		14210	17338	(3128)
<b>Month to date- Apr</b>		<b>36003</b>	<b>43150</b>	<b>(7147)</b>
FII (Prov.) (Rs Cr)		Buy	Sell	Net
1-Apr-25		10480	16382	(5902)
2-Apr-25		12099	13638	(1539)
3-Apr-25		9682	12488	(2806)
4-Apr-25		13947	17431	(3484)
7-Apr-25		13372	22412	(9040)
<b>Month to date-Apr</b>		<b>59580</b>	<b>82351</b>	<b>(22771)</b>
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
1-Apr-25		12700	8377	4323
2-Apr-25		11762	8953	2809
3-Apr-25		11567	11346	221
4-Apr-25		14454	16175	(1720)
7-Apr-25		26528	14406	12122
<b>Month to date-Apr</b>		<b>77011</b>	<b>59256</b>	<b>17755</b>
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
27-Mar-25		4922	4385	537
28-Mar-25		8775	3223	5552
2-Apr-25		7734	6495	1239
3-Apr-25		2322	5741	(3419)
4-Apr-25		4511	5074	(563)
<b>Month to date- Apr</b>		<b>14567</b>	<b>17311</b>	<b>(2743)</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	570	13%	243	8%
Decline	3515	83%	2684	90%
Unchanged	140	3%	48	2%

Market Turnover	07-Apr	04-Apr	Var (%)
BSE Cash	8462	5670	49%
NSE Cash	124335	103513	20%
NSE Futures	205140	145217	41%
NSE Options	14389070	13131603	10%
Total (Rs.Cr)	14727007	13386004	10%

Volatility Index	07-Apr	04-Apr
Volatility Index	22.79	13.76

Index PE - TTM	07-Apr	Yr. High	Yr. Low
Sensex	20.4	25.7	20.3
Nifty	20.1	24.4	19.6

**Corporate News**
**Bharat Electronics Bags Rs 2,210 Cr Deal to Supply Helicopter Kits to Air Force**

BEL bagged a deal worth Rs 2,210 cr to supply advanced gear to the Indian Air Force. The Ministry of Defence signed a contract to secure Electronic Warfare (EW) suites and aircraft modification kits as well as their installation on Mi-17 V5 helicopters, along with associated equipment (NDTV)

**KPI Green Energy has terminated the order from Sai Bandhan Infinium**

The company has terminated the order from Sai Bandhan Infinium for the 66.20 MW hybrid power project under the captive power producer (CPP) segment due to changes in project technical requirements post-receipt of the order. This termination will not have any material financial impact on the company. (MC)

**Brigade Enterprises signed a joint development agreement for a 10-acre residential project in Mysuru**

The company has signed a Joint Development Agreement for a residential project spread across 10 acres and 37 guntas, with a total development potential of around 0.37 million square feet. The gross development value of the project is around Rs 225 cr. (MC)

**Economy**
**Govt increases excise duty on petrol, diesel by Rs 2 per litre; consumers not to be hit**

The government has increased excise duty on petrol and diesel by Rs 2 per litre amid fluctuating global oil prices. The rise in excise duty will not impact Indian consumers due to recent cuts in fuel prices. Major oil marketing companies' shares fell, and global crude benchmarks hit their lowest levels since April 2021. (ET)

**Mumbai Customs clears US-bound shipment of cut and polished diamonds worth \$319.9 mn**

Mumbai saw a surge in diamond exports to the US before new tariffs. The industry fears trouble after April 9. Martin Rapaport advised against exporting diamonds from the US. Experts believe US retailers might profit initially. The Surat Diamond Bourse could face challenges. Reduced demand may lead to production adjustments. (ET)

**International**
**Trump orders fresh review of Nippon Steel's bid for US Steel**

President Donald Trump directed a U.S. national security panel to take a fresh look at Nippon Steel's bid for U.S. Steel to help determine if "further action" is appropriate, raising hopes that the deal could gain an elusive green light. (Inv)

Top 5 Nifty Gainers	07-Apr	04-Apr	Var(%)
BRITANNIA	5056	5023	0.6%
HINDUNILVR	2249	2245	0.2%
Top 5 Nifty Losers	07-Apr	04-Apr	Var(%)
TRENT	4741	5563	-14.8%
TATASTEEL	129	140	-7.8%
JSWSTEEL	930	1006	-7.5%
HINDALCO	562	600	-6.4%
SHRIRAMFIN	614	654	-6.1%

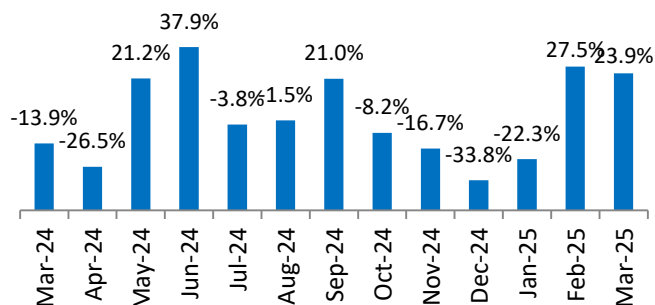
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	73138	-3.0%	-5.5%	-1.6%	-2.1%
MIDCAP	39108	-3.5%	-5.8%	-2.0%	-4.5%
SMLCAP	43974	-4.1%	-5.7%	-3.6%	-4.4%
AUTO	44389	-3.8%	-7.0%	-5.7%	-11.6%
BANKEX	57160	-3.4%	-4.0%	3.0%	4.2%
Capital Goods	57056	-4.3%	-9.0%	-3.2%	-9.1%
FMCG	19262	-1.3%	-1.0%	2.3%	-0.9%
Health Care	39280	-3.1%	-5.2%	-0.7%	10.2%
IT	32110	-2.9%	-11.1%	-13.7%	-10.5%
METAL	26680	-6.2%	-13.4%	-11.7%	-10.6%
Oil & Gas	23550	-2.8%	-6.3%	-1.2%	-16.7%
Power	6332	-2.1%	-3.9%	2.9%	-10.3%
Realty	6016	-5.7%	-8.9%	-5.0%	-19.6%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	68908	0.6%	1.3%	-0.6%	-17.1%
Fresh Exposure	5525	4.2%	-0.8%	45.3%	-1.1%
Exposure liquidated	4541	-7.2%	-18.1%	4.2%	-8.2%
Closing Net scripwise outstanding	69892	1.4%	2.7%	1.6%	-16.5%

NSE USD Futures	07-Apr	04-Apr	Var (%)
Apr Expiry (Rs./\$)	86.82	87.00	-0.2%
May Expiry (Rs./\$)	86.98	86.82	0.2%
Total Turnover (Rs. Cr)	3314	3132	6%

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

### SML Isuzu Monthly Volume Growth (YoY) (Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.15%	4.18%	(3) bps
Japan	1.24%	1.12%	12 bps
India	6.48%	6.46%	2 bps
UK	4.62%	4.45%	17 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)	1829	1828	0.9

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	16.78	23310150	16.58	19389289	1.21%	1	1440.44	1396.75	3.1%
Wipro	2.85	13825776	2.79	9069000	2.15%	1	244.65	242.90	0.7%
Dr.Reddy's	12.58	4173462	12.36	3932444	1.78%	1	1079.90	1087.90	-0.7%
ICICI Bank	30.29	8398643	30.29	6941119	0.00%	2	1300.08	1287.55	1.0%
HDFC Bank	63.78	4992588	64.90	8212255	-1.73%	3	1825.01	1757.70	3.8%

### GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	35.50	37.35	(1.9)	-5.0%
RIL	54.00	54.80	(0.8)	-1.5%
SBI	85.50	87.30	(1.8)	-2.1%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.80%	3.00%
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 (%)	-0.70%	0.50%

### Economic Calendar

	Date
Indian GDP Data	30 May
Indian Inflation Data CPI	14 Apr
Indian Inflation Data WPI	15 Apr
Indian Monetary Policy	09 Apr
India's Industrial Production (IIP)	28 Apr
US Inflation Data	10 Apr
US GDP	30 Apr
US Unemployment Data	02 May
US Fed Rate	07 May
China GDP	16 Apr
China Inflation Data	10 Apr

### 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 07/04/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
542377	AARSHYAM	AIKYAM CAPITAL PRIVATE LIMITED	B	150000	9.88
542377	AARSHYAM	NNM SECURITIES PVT LTD	S	64000	9.88
542377	AARSHYAM	NOVA GLOBAL OPPORTUNITIES FUND PCC - BLUESTONE	B	141665	9.88
542377	AARSHYAM	PERFECT-OCTAVE PRIVATE LIMITED	S	249966	9.88
534796	CDG	ANISHA FINCAP CONSULTANTS LLP	B	74634	50.1
534796	CDG	RUCHIRA GOYAL	B	20000	50.1
534796	CDG	WISCAP INVESTMENT PRIVATE LIMITED	S	24000	50.1
544387	DESCO	JAYSUKHBHAI THATHAGAR	B	39000	186.05
544387	DESCO	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	56000	182.6
544387	DESCO	UJWAL ARORA	B	50000	201.8
517170	EDVENSWA	HARSHA GUPTA	S	166666	40.46
532359	HITKITGLO	SURBHI HARSHIT KABRA	S	233918	1.59
532359	HITKITGLO	VIJAY RADHAKISHEN CHOUDHARY - (HUF)	S	252000	1.57
540134	IISL	N L RUNGTA (HUF)	S	33000	5.97
539175	INDRAIND	SAKSHI JAIN	S	89251	8.21
539175	INDRAIND	SHAILESH DHAMELIYA	B	222961	8.19
539175	INDRAIND	SUDARSHAN KUMAR GUPTA	S	77987	8.21
524614	INDXTRA	GARIMA VENTURE FINANCE LIMITED	B	2100000	4.67
524614	INDXTRA	KAIVAN KAMLESH SHAH	S	973169	4.66
524614	INDXTRA	MALANI WEALTH ADVISORS PRIVATE LIMITED	B	1000000	4.67
524614	INDXTRA	YESHABEN PRASHANKUMAR KOTHARI	S	674158	4.67
526859	ISFL	SERAPHIM VENTURES PRIVATE LIMITED	B	618500	1.8
543289	KGES	GREEN PEAKS ENTERPRISES LLP	S	18000	33.47
543289	KGES	JIGAM SHASHIKANT GANDHI	S	30000	33.47
543289	KGES	KANTA DEVI SAMDARIA	B	24000	33.47
543289	KGES	MANOJ KUMAR KANDA	B	18000	33.47
544270	KGVL	HARSHIT HARESH MEHTA	B	50400	59.95
544270	KGVL	MEHTA RISHIT HARESHBHAI	B	50400	60
544270	KGVL	SOMANI VENTURES AND INNOVATIONS LIMITED	S	36000	51.36
517320	MAGNUS	RUCHIRA GOYAL	B	23800	8.26
531832	NAGTECH	KRISHNA KUMAR VARMA	B	54000	57.68
544245	NHL	PRIYANKA SONKER	S	20800	65.89
544245	NHL	SHUBHPANDEY	B	17600	65.89
531512	ORIENTTR	KANAK INNOVATIVE LLP	S	141251	23
531512	ORIENTTR	KARISHMA TUSHAR PANSARE	B	100000	23
544391	RETAGGIO	ANUPAM STOCK BROKING PRIVATE LIMITED	B	252000	25.07
544391	RETAGGIO	MSR VERSATILE VENTURES LLP	B	312000	24.71
544391	RETAGGIO	SHERWOOD SECURITIES PVT LTD	B	420000	25.09
543256	RFLI	VASANTBEN VIJAYBHAI MORI	S	50301	23.5
543256	RFLI	VASANTBEN VIJAYBHAI MORI	B	7053	23.01
543366	SBLI	DEEPAK PRADIPKUMAR RAVAL	S	12000	40.57
543366	SBLI	RIDDHI KARAN KOTHARI	B	12000	40.57
532879	SSLEL	SHITAL VINOD NAWANDHAR	S	37325	230
539117	SUJALA	CHAITALI AMIT MANJAREKAR	S	90000	69.98
539117	SUJALA	CHAUBARA EATS PRIVATE LIMITED	B	71000	69.99
539117	SUJALA	HUSSAIN AYYUB AATAR	S	75000	69.99
539117	SUJALA	KANAK INNOVATIVE LLP	S	52095	70

08<sup>th</sup> April, 2025

539117	SUJALA	KARISHMA TUSHAR PANSARE	B	108500	69.98
539117	SUJALA	NIRMALABEN SHANTILAL GADA	B	30000	70
539117	SUJALA	RAMESH KUMAR AGARWAL	B	30000	69.95
526133	SUPERTEX	DWARKADEVI CHAMPALALJI PANPALIA	B	68500	8.22
526133	SUPERTEX	MANOJ KUMAR S	S	65033	8.23
542765	TRANSPACT	RG HUF	B	5000	201.14
531716	TRICOMFRU	SRI MATHA MEENAVALLI	B	110000	2.49
544329	VANDU	ASHIKA GLOBAL SECURITIES PRIVATE LIMITED	S	98000	52.07

NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
ABIN-RE1	A B Infrabuild Ltd	BHARATKUMAR PUNMAJI PARMAR	SELL	200060	30.46
ABIN-RE1	A B Infrabuild Ltd	CATALYST CAPITAL PARTNERS PRIVATE LIMITED	BUY	196617	30.46
ABIN-RE1	A B Infrabuild Ltd	JITENDRA RASIKLAL SANGHAVI	BUY	100000	30.46
ABIN-RE1	A B Infrabuild Ltd	KAUSHIK HASMUKHLAL GANDHI	BUY	94821	32.73
ABIN-RE1	A B Infrabuild Ltd	NIMESH SAHADEO SINGH	BUY	87800	31
ABIN-RE1	A B Infrabuild Ltd	SAVITA AMIT MISHRA	SELL	690200	30.53
CYIENT	Cyient Limited	HDFC MF	BUY	623896	1099
CYIENT	Cyient Limited	NWBP AS DP OF FIRST STATE INDIAN SUBCONT FD A SUB FD OF FS	SELL	679655	1099.72
EFFWA	Effwa Infra & Research L	SANDEEP SINGH	BUY	125200	180.49
GENESYS	Genesys International Cor	FLORIDA RETIREMENT SYSTEM	SELL	225192	547.13
POLYSIL	Polysil Irrigation Syst L	NEO APEX VENTURE LLP	BUY	60000	26.1
SHANTI	Shanti Overseas (Ind) Ltd	TEJ RAM AGARWAL	BUY	92000	14.45

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