

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	42792	42655	137	0.3%
Dow Futures	42846	42885	(39)	-0.1%
Nasdaq	19215	19211	4	0.0%
FTSE	8699	8685	15	0.2%
Nikkei	37692	37499	193	0.5%
Hang Seng	23515	23333	183	0.8%
Gift Nifty	25076	24992	85	0.3%
Straits Singapore	3884	3876	7	0.2%
South Korea	2608	2603	5	0.2%
Taiwan	21595	21524	71	0.3%
Shanghai	3373	3368	5	0.2%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9524	9448	76	0.8%
Alumin (\$/MT)	2450	2482	(32)	-1.3%
Zinc (\$/MT)	2677	2692	(15)	-0.6%
Brent Crude (\$/bbl)	65	66	(0)	-0.1%
Gold (\$/Ounce)	3211	3230	(18)	-0.6%
Silver (\$/Ounce)	32	32	(0)	-0.3%
Light Crude (\$/bbl)	63	63	0	0.2%
N G (\$/mmbtu)	3	3	0	0.7%
Sugar (\$/MT)	490	490	(1)	-0.1%
Rubber (Rs./kg)	197	197	0	0.0%
Baltic Dry Index	1347	1388	(41)	-3.0%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	85.40	85.52	-0.14%
Rs./ Euro	96.32	95.74	0.61%
Rs./Chinese Yuan	11.83	11.84	-0.12%
Yen / \$ rate	144.86	144.86	0.00%
\$ US/Euro	1.12	1.12	0.02%

Dollar Index	Current	Previous	Var(%)
Dollar Index	100.37	100.43	-0.06%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24870	55240
Support 2	24800	55000
Resistance	25070	55770

Securities in Ban For Trade	
TITAGARH	MANAPPURAM
HINDCOPPER	

Market Review

US: A renewed wave of dip buying propelled stocks higher on Monday, as traders looked beyond Moody's recent downgrade of the US credit rating, which had initially caused bond yields to spike.

Asia: Shares climbed for the first time in four days, reflecting gains in the US that brought the S&P 500 index close to entering a bull market.

India: The benchmark equity indices closed lower on Monday for the second consecutive session amid volatility in the stock markets following Moody's downgrade of the US by a notch. **Market is expected to open on a gap up note and likely to witness positive move during the day.**

Global economy China cut benchmark lending rates for the first time since October on Tuesday, while major state banks lowered borrowing costs as authorities work to ease monetary policy to help buffer the economy from the impact of the Sino-U.S. trade war. The People's Bank of China said the one-year loan prime rate (LPR), a benchmark determined by banks, had been lowered by 10 basis points to 3.0%, while the five-year LPR was reduced by the same margin to 3.5%.

Brazil's economy powered through the first quarter, defying high borrowing costs thanks to a bumper grain harvest and growth in the industrial sector, central bank data showed on Monday. The IBC-Br economic activity index, regarded as a proxy for gross domestic product (GDP), grew 1.3% in the January-to-March period from the previous quarter. The agricultural component of the index rose 6.1% in the last quarter. Even stripping out that boost, economic activity still increased 1.0% from the previous quarter, driven mainly by industrial growth of 1.6%, according to the central bank's methodology.

Commodities: Oil prices experienced a slight increase due to potential setbacks in U.S.-Iran nuclear talks, diminishing prospects of increased Iranian oil supply.

Gold prices experienced a slight dip as the dollar strengthened and optimism grew regarding potential ceasefire negotiations between Russia and Ukraine.

Currency: The dollar traded sideways on Tuesday after having glided lower for a week, hemmed in by the Fed's caution over the economy and as U.S. lawmakers came closer to passing a bill expected to widen the nation's fiscal deficit.

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	14547	2564	14810	2651	(87)	152988	27017	152311	26992	677	25
Index Option	4215892	777647	4211919	776709	938	2810899	511179	2596373	472326	214526	38853
Stock Future	298452	19047	357120	22762	(3715)	5965303	385566	5973687	386384	(8384)	(818)
Stock Option	1130898	75784	1172996	78655	(2871)	1699804	110096	1622140	104983	77664	5113
Total	5659789	875042	5756845	880777	(5735)	10628994	1033858	10344511	990685	284483	43173

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
9-May-25		24263	26651	(2388)
13-May-25		17669	17505	164
14-May-25		15095	14165	931
15-May-25		21440	15694	5747
16-May-25		19835	12351	7483
Month to date- May		179223	153293	25930
FII (Prov.) (Rs Cr)		Buy	Sell	Net
13-May-25		17231	17708	(477)
14-May-25		14861	13929	932
15-May-25		21412	16019	5393
16-May-25		21380	12549	8831
19-May-25		11817	12343	(526)
Month to date-May		190664	167407	23257
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
13-May-25		16552	12278	4274
14-May-25		13603	13287	316
15-May-25		14750	16418	(1668)
16-May-25		16972	11785	5187
19-May-25		10988	11226	(238)
Month to date-May		167735	144674	23061
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
9-May-25		2825	2939	(115)
13-May-25		1705	4200	(2495)
14-May-25		2317	3989	(1672)
15-May-25		1426	2211	(784)
16-May-25		1348	1893	(545)
Month to date- May		23382	29206	(5825)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2492	58%	1812	61%
Decline	1616	38%	1081	36%
Unchanged	165	4%	75	3%

Market Turnover	19-May	16-May	Var (%)
BSE Cash	8630	10699	-19%
NSE Cash	116116	149818	-22%
NSE Futures	113194	114851	-1%
NSE Options	9799632	9258823	6%
Total (Rs.Cr)	10037573	9534190	5%

Volatility Index	19-May	16-May
Volatility Index	17.36	16.55

Index PE - TTM	19-May	Yr. High	Yr. Low
Sensex	22.9	25.2	20.3
Nifty	22.3	24.4	19.6

Corporate News
Shyam Metalics forays into wagon manufacturing to set up plant in West Bengal

Company announced its strategic entry into wagon manufacturing, stating that it will establish a production facility in West Bengal with an annual production capacity of 4,800 wagons. Shyam Metalics will establish the plant through its step-down Ramsarup Industries in Kharagpur, West Bengal. (NDTV)

Waaree Energies gets board nod to acquire Kamath Transformers for Rs 293 crore

The company's board has approved a proposal to acquire Kamath Transformers Private Ltd for around Rs 293 crore. Kamath Transformers is in the business of manufacturing transformers. (NDTV)

SC rejects Airtel, Vodafone Idea and Tata Teleservices' petitions seeking waiver of interest, penalties on AGR dues

The Supreme Court dismissed petitions filed by telecom majors Bharti Airtel, Vodafone Idea (Vi) and Tata Teleservices that sought a waiver of interest, penalty, and interest on penalty related to their adjusted gross revenue dues. (NDTV)

Economy
India-UK FTA: Government plans GeM push for global tenders

India's government e-marketplace, or GeM, plans to introduce global tendering functionalities for the public procurement portal this year, following a free trade agreement with the UK that opens government procurement on both sides to entities based in the two countries. At present, these features are not available on the GeM portal. (ET)

Agriculture minister Chouhan signals plan to use Indus water for Indian farmers

Union Agriculture Minister Shivraj Singh Chouhan, in an interaction with farmers, said keeping Indus Waters Treaty in abeyance is in the interest of the farmers and plan will be chalked out to use the Indus river water for agriculture especially in several north-Indian states. (ET)

International
Nissan considering plant closures in Japan, overseas

Sportswear retailer Nike is laying off some of its employees in its technology division. Nike will shift some of that work to third-party vendors, the representative said in an email, adding that the changes were announced last week. (Invst)

Top 5 Nifty Gainers	19-May	16-May	Var(%)
BAJAJ-AUTO	8851	8483	4.3%
SHRIRAMFIN	678	666	1.8%
POWERGRID	304	300	1.3%
HEROMOTOCO	4388	4345	1.0%
BAJFINANCE	9256	9167	1.0%
Top 5 Nifty Losers	19-May	16-May	Var(%)
ETERNAL	238	246	-3.1%
GRASIM	2727	2804	-2.8%
INFY	1560	1590	-1.9%
TATACONSUM	1149	1168	-1.6%
TCS	3519	3561	-1.2%

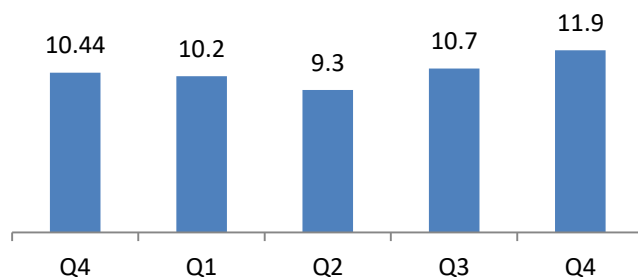
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	82059	-0.3%	-0.4%	4.5%	10.9%
MIDCAP	45128	0.3%	3.2%	7.5%	4.8%
SMLCAP	51430	0.8%	5.6%	7.3%	7.2%
AUTO	53881	0.4%	2.8%	12.5%	1.3%
BANKEK	62985	0.0%	-0.2%	1.1%	14.4%
Capital Goods	68800	-0.2%	5.4%	12.6%	2.6%
FMCG	20791	-0.1%	0.3%	1.1%	4.4%
Health Care	42690	0.6%	2.6%	2.4%	19.7%
IT	36938	-1.2%	-1.6%	12.1%	7.9%
METAL	31011	0.0%	3.0%	8.1%	-4.7%
Oil & Gas	27320	-0.3%	1.8%	6.7%	-5.6%
Power	6839	0.4%	2.4%	1.8%	-10.0%
Realty	7233	2.2%	6.9%	10.4%	-8.2%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	69967	0.4%	1.2%	4.0%	-8.5%
Fresh Exposure	8497	20.4%	105%	60.7%	129%
Exposure liquidated	7670	13.1%	60.3%	63.8%	61.4%
Closing Net scripwise outstanding	70794	1.2%	3.3%	4.3%	-6.1%

NSE USD Futures	19-May	16-May	Var (%)
Apr Expiry (Rs./\$)	86.00	87.56	-1.8%
May Expiry (Rs./\$)	85.46	87.50	-2.3%
Total Turnover (Rs. Crore)	4075	2530	61%

Sectors	TTM PE
Auto	32.01
Auto Ancillary	42.04
Banking	13.98
Engineering	49.33
Cement	77.95
Diamonds & Jewellery	44.27
Housing Finance	24.49
Infrastructure & Const	29.45
Metals-Aluminium	28.99
Metal – Steel	18.34
Oil Expl.	8.43
Pharma	9.38
Power – Gen. Supp.	38.43
Information Tech.	27.53
Sugar	18.97
Telecom Serv. Prov.	37.33
Tyres	31.94

Acc Cement Volume Data in MnT (Source: Company Data)



10 year G-Sec Yield	Current	Previous	Change
US	4.45%	4.45%	(0) bps
Japan	1.49%	1.49%	(0) bps
India	6.29%	6.27%	2 bps
UK	4.66%	4.65%	1 bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	691	691	0.0%
Inflation - WPI	0.85%	2.05%	(120) bps
Inflation - CPI	3.16%	3.34%	(18) 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)	2330	2331	(1.2)

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	18.33	9394498	18.31	12914272	0.11%	1	1565.45	1559.80	0.4%
Wipro	2.95	2770692	2.96	4048684	-0.34%	1	251.94	251.75	0.1%
Dr.Reddy's	14.46	1252614	14.44	1085241	0.14%	1	1234.94	1219.00	1.3%
ICICI Bank	34.30	3235375	33.99	3735463	0.91%	2	1464.67	1449.00	1.1%
HDFC Bank	73.78	1332136	73.02	1493469	1.04%	3	2100.36	1938.70	8.3%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	42.25	42.00	0.3	0.6%
RIL	67.50	68.20	(0.7)	-1.0%
SBI	93.10	92.40	0.7	0.8%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.30%	2.40%
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%	-0.10%

Economic Calendar

	Date
Indian GDP Data	30 May
Indian Inflation Data CPI	12 June
Indian Inflation Data WPI	16 June
Indian Monetary Policy	06 Jun
India's Industrial Production (IIP)	28 May
US Inflation Data	11 June
US GDP	29 May
US Unemployment Data	06 June
US Fed Rate	18 June
China GDP	15 July
China Inflation Data	09 June

Event Update

Name	Date	Purpose
Colab Platforms Ltd.	21/05/25	Stock Split from Rs.2/- to Re.1/-
Odyssey Technologies Ltd.	21/05/25	Rs.1.00 per share(10%)Final Dividend
Page Industries Ltd.	21/05/25	Rs.200.00 per share(2000%)Interim Dividend
Aditya Birla Fashion and Retail Ltd.	22/05/25	Spin Off
Ashok Leyland Ltd.	22/05/25	Second Interim Dividend
Emami Ltd.	22/05/25	Third Interim Dividend
GM Breweries Ltd.	22/05/25	Rs.7.50 per share(75%)Final Dividend
BSE Ltd.	23/05/25	Bonus
Keystone Realtors Ltd	23/05/25	Rs.1.50 per share(15%)Final Dividend
LTIMindtree Ltd.	23/05/25	Rs.45.00 per share(4500%)Final Dividend
SEPC Ltd.	23/05/25	Right Issue of Equity Shares
Sula Vineyards Ltd.	23/05/25	Rs.3.60 per share(180%)Final Dividend
Viksit Engineering Ltd.	23/05/25	Resolution Plan-Reduction of Capital

Bulk Deal As On 19/05/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
512165	ABASENT	RESONANCE OPPORTUNITIES FUND	B	399952	31.74
535693	BRAHMINFRA	BIPIN BHANUDAS CHARHOLIKAR	B	280000	70.76
512441	ENBETRD	SAKET KUMAR	S	4720168	0.68
521137	EUREKAI	AMITKUMARJAYANTILAPATEL	B	100000	11.48
521137	EUREKAI	ANKITKUMAR PRAVINCHANDRA MEHTA	S	48424	11.51
521137	EUREKAI	VIJAYKUMAR DHIRAJLAL PAREJIYA	B	45000	11.4
542851	GENSOL	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	350000	69.6
513536	GNRL	RAJASTHAN GASES LIMITED	S	1207994	50.89
539479	GTV	MAHESH AGRAWAL	S	20000	825.76
505336	HARSHILAGR	STROTRAM GLOBE PRIVATE LIMITED	S	13349012	2.32
505336	HARSHILAGR	STROTRAM GLOBE PRIVATE LIMITED	B	903802	2.37
505336	HARSHILAGR	UMA SHANKAR EXIM PRIVATE LIMITED	S	5671899	2.36
505336	HARSHILAGR	VAKANDA SERVICES PRIVATE LIMITED	S	3980681	2.38
505336	HARSHILAGR	VAKANDA SERVICES PRIVATE LIMITED	B	10375108	2.37
540377	IFL	D3 STOCK VISION LLP	S	5413885	0.83
540377	IFL	D3 STOCK VISION LLP	B	5413885	0.84
539175	INDRAIND	SEIFER RICHARD MASCARENHAS	B	180000	11.09
539175	INDRAIND	SHAILESH DHAMELIYA	S	178868	11.09
539175	INDRAIND	SHAILESH DHAMELIYA	B	11711	11.08
544192	IXIGO	SAIF PARTNERS INDIA IV LIMITED	S	2150000	178
544160	JAYKAILASH	NEEL NARENDRABHAI PUJARA	S	32000	62.76
544221	KIZI	INNOVANA THINKLABS LIMITED	S	60000	20.07
543400	OMNIPOTENT	HEMANT NARESH JAIN HUF	B	130000	13.05
543400	OMNIPOTENT	MUKUL KUMAR SAXENA	S	44000	13.05
531512	ORIENTTR	ANISA ALNASIR GILANI	S	64110	20.89
540198	OSIAJEE	RAJIV KUMAR	S	61500	207.66
540198	OSIAJEE	RINKURAM	B	30000	207.5
539519	SATTVASUKU	MANJU DEVI	S	1777024	1.02
539519	SATTVASUKU	MANJU DEVI	B	2706	1.07
544399	SRIGEE	ASHWIN STOCKS AND INVESTMENT PRIVATE LIMITED	B	36000	240.93
511700	STANCAP	DULCET ADVISORY PRIVATE LIMITED	S	24100000	0.38
530217	SWOJAS	PARTHRAJSINH HARSHADSINH RANA	S	350000	23.21
531499	SYBLY	VISAGAR FINANCIAL SERVICES LIMITED	S	48413	3.81
531432	SYTIXSE	OMKARMUNDHRA	B	60000	9.26
509015	THAKRAL	KANWALJEET SINGH DHILLON	S	62835	9
531716	TRICOMFRU	KANHAIYA AGARWAL	S	100000	3.3
532402	USGTECH	NANDANVAN COMMERCIAL PRIVATE LIMITED	B	206000	12.13
538579	ZINEMA	MANOJ KUMAR KANDA	B	40000	17.3

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AGSTRA	AGS Transact Tech Ltd	ISHAAN TRADEFIN LLP	SELL	700000	5.13
AMIORG	Ami Organics Limited	KOTAK MAHINDRA MUTUAL FUND	BUY	1348921	1115
AMIORG	Ami Organics Limited	KOTAK MAHINDRA MUTUAL FUND	BUY	1348921	1115
AMIORG	Ami Organics Limited	KOTAK MAHINDRA MUTUAL FUND.	BUY	1348921	1115
AMIORG	Ami Organics Limited	KOTAK MAHINDRA MUTUAL FUND.	BUY	1348921	1115
AMIORG	Ami Organics Limited	NARESHKUMAR RAMJIBHAI PATEL	SELL	1348921	1115
AMIORG	Ami Organics Limited	NARESHKUMAR RAMJIBHAI PATEL	SELL	1348921	1115
ARUNAYA	Arunaya Organics Limited	MNM STOCK BROKING PVT LTD	BUY	98000	46.5
BASML-RE1	Bannari Amman Spinning	SANJAY GARG	BUY	94216	3.48
BBL	Bharat Bijlee Ltd	MAHINDRA MANULIFE MUTUAL FUND	SELL	100000	3089.64
DCMFINSERV	DCM Financial Ser Ltd	ALMONDZ GLOBAL SECURITIES LTD	SELL	96061	7.6
GATDVR-RE	GACM Technologies Ltd	L7 HITECH PRIVATE LIMITED	SELL	3000000	0.11
GATDVR-RE	GACM Technologies Ltd	NIMMAKAYALA YELLA REDDY	BUY	546000	0.11
GODHA	Godha Cabcon Insulat Ltd	POOJA PRAGNESH DAVE	SELL	10000000	0.57
LAKSHYA	Lakshya Powertech Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	90400	171.14
IXIGO	Le Travenues Technology I	SAIF PARTNERS INDIA IV LIMITED	SELL	2150000	178
LLOYDS-RE1	LLOYDS ENG WORKS LTD	LLOYDS ENTERPRISES LIMITED	SELL	4075323	15.53
MANORG	Mangalam Organics Limited	NIVESHAA HEDGEHOGS FUND	BUY	50426	574.91
ONEPOINT	One Point One Sol Ltd	ZETA GLOBAL FUNDS (OEIC) PCC LIMITED - ZETA SERIES B FUND PC	BUY	2000000	66.75
OLIL	Oneclick Logistics Ind L	BHASKAR NARMADASHANKAR OZA	SELL	24000	170.25
OLIL	Oneclick Logistics Ind L	GRSM MINERALS & METALS LLP	SELL	21600	167.61
PARAS	Paras Def and Spce Tech L	ANISH HEMANT MEHTA	SELL	217159	1664.62
PARAS	Paras Def and Spce Tech L	KAAJAL HARSH BHANSALI	SELL	217049	1662.62
PARAS	Paras Def and Spce Tech L	SHARAD VIRJI SHAH	SELL	900000	1682.67
PRAXIS	Praxis Home Retail Ltd	CROMEWELL ENTERPRISE PRIVATE LIMITED	BUY	1000000	11.63
PRAXIS	Praxis Home Retail Ltd	D3 STOCK VISION LLP	BUY	750000	11.63
PRAXIS	Praxis Home Retail Ltd	MATHEW CYRIAC	BUY	9299540	11.63
PRAXIS	Praxis Home Retail Ltd	SUBHASH PHOOTARMAL RATHOD	BUY	4750000	11.63
PRAXIS	Praxis Home Retail Ltd	SURPLUS FINVEST PRIVATE LIMITED	SELL	18500000	11.63
SATKARTAR	Sat Kartar Shopping Ltd	PASHUPATI CAPITA SER PVT LTD	SELL	79200	178.24
SATKARTAR	Sat Kartar Shopping Ltd	SETU SECURITIES PRIVATE LIMITED	SELL	120000	183.52
SHANTI	Shanti Overseas (Ind) Ltd	INVENTURE GROWTH & SECURITIES LTD	BUY	340000	17.3
SHEETAL	Sheetal Universal Limited	JNSP TRADING LLP	SELL	88000	114.09
UNIVAFOODS	Univ a Foods Limited	RASHMIKANT VENILAL MEHTA	SELL	150000	11.19
UNIVAFOODS	Univ a Foods Limited	VARSHA CHUGH	BUY	100000	11.19
VGINFOTECH	Virtual Galaxy Infotech L	ALACRITY SECURITIES LTD	SELL	192000	180
VGINFOTECH	Virtual Galaxy Infotech L	VINOD KUMAR	BUY	372000	181.02

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