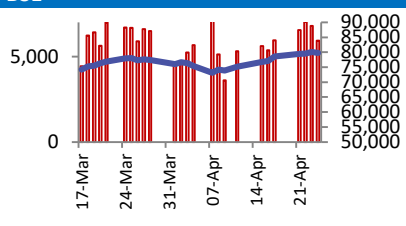
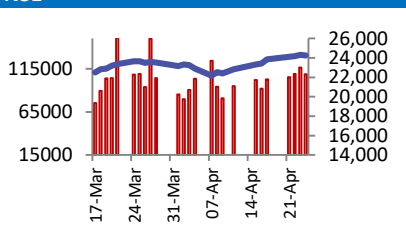


BSE	NSE
	
Open 80058 High 80174 Low 79725 Close 79801 Change -315 Volume (Lacs) 5810 Turnover (Rs.inCr) 5930	Open 24278 High 24348 Low 24216 Close 24247 Change -82 Volume(Lacs) 37357 Turnover(Rs.in Cr) 108519

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	40093	39607	487	1.2%
Dow Futures	40209	40262	(53)	-0.1%
Nasdaq	17166	16708	458	2.7%
FTSE	8407	8403	4	0.1%
Nikkei	35527	35039	488	1.4%
Hang Seng	22184	21910	274	1.3%
Gift Nifty	24497	24247	251	1.0%
Straits Singapore	3831	3832	(1)	0.0%
South Korea	2541	2522	19	0.7%
Taiwan	19917	19479	439	2.3%
Shanghai	3298	3297	1	0.0%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9420	9393	27	0.3%
Alumin (\$/MT)	2461	2449	12	0.5%
Zinc (\$/MT)	2690	2688	3	0.1%
Brent Crude (\$/bbl)	67	67	0	0.3%
Gold (\$/Ounce)	3348	3349	(1)	0.0%
Silver (\$/Ounce)	33	34	(0)	-0.3%
Light Crude (\$/bbl)	63	63	0	0.3%
N G (\$/mmbtu)	3	3	0	0.3%
Sugar (\$/MT)	505	503	1	0.2%
Rubber (Rs./kg)	198	198	0	0.0%
Baltic Dry Index	1353	1300	53	4.1%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	85.27	85.42	-0.18%
Rs./ Euro	97.08	97.54	-0.47%
Rs./Chinese Yuan	11.69	11.70	-0.10%
Yen / \$ rate	142.93	142.63	0.21%
\$ US/Euro	1.14	1.14	-0.35%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.62	99.38	0.25%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24170	55000
Support 2	24100	54740
Resistance	24370	55500

Securities in Ban For Trade
Nil

Market Review

US: US stocks closed higher on Thursday, rallying for a third straight day with a solid boost from technology shares as investors parsed a mixed bag of corporate earnings and watched for signs of progress in the U.S.-China tariff stand-off.

Asia: Asian stock markets headed for a second straight week of gains on Friday and the dollar for its first weekly rise in more than a month as investors have welcomed an apparent softening of the White House stance on China, despite no signal of detente.

India: Benchmark indices snapped a seven-day gaining streak to end lower with modest losses on April 24, as Nifty 50 closed below 24,300 on selling pressure across sectors, barring metal and pharma. **Nifty is expected to open on a gap up note and likely to witness positive move during the day.**

Global economy: Tokyo consumer price index inflation grew more than expected to a two-year high in April amid a recovery in private spending, with the strong print furthering speculation over more interest rate hikes by the Bank of Japan. Tokyo CPI grew 3.5% year-on-year in April from 2.9% in the prior month. The Energy Information Administration (EIA) recently released its Natural Gas Storage report, revealing a significant change in the number of cubic feet of natural gas held in underground storage over the past week. The actual number reported was 88B cubic feet, a figure that notably outstripped both the forecasted and previous numbers. Compared to the forecasted increase of 69B, the actual increase of 88B indicates a weaker demand, which is bearish for natural gas prices. This suggests that the energy market could potentially see a drop in the price of natural gas due to the surplus in storage.

Britain made more vehicles in March as demand increased for British-built cars overseas and for commercial vehicles at home, but it was not enough to prevent a quarterly decline in output. A total of 79,018 cars, vans, trucks, taxis, buses and coaches were manufactured in the last month, up 17.1% yoy.

Commodities: Oil prices edged higher on Friday but were on track for a weekly loss as a potential OPEC+ output increase and a possible ceasefire in the Russia-Ukraine war may raise supply at the same time conflicting U.S. tariff signals limit the demand outlook.

Gold headed for a weekly gain after a volatile run of trading, with investors assessing trade tensions and the possibility of US rate cuts.

Currency: The dollar drifted higher on Friday, following small losses a day earlier, as traders grappled with the outlook for the U.S. economy following President Donald Trump's erratic messaging on trade deals and Federal Reserve interference.

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	47474	8146	41873	7190	956	135872	23171	208595	35944	(72723)	(12773)
Index Option	21996479	3797907	22032812	3806832	(8925)	1257035	223647	4130404	729924	(2873369)	(506277)
Stock Future	850655	55415	800404	52442	2973	5756415	362837	6095142	384494	(338727)	(21657)
Stock Option	687542	45507	689064	45571	(64)	437379	27594	1800643	113213	(1363264)	(85619)
Total	23582150	3906975	23564153	3912035	(5060)	7586701	637249	12234784	1263575	(4648083)	(626326)

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
16-Apr-25		15379	11353	4026
17-Apr-25		17997	13680	4317
21-Apr-25		11654	9905	1750
22-Apr-25		16604	14639	1965
23-Apr-25		17857	13890	3967
Month to date- Apr		199430	204198	(4768)
FII (Prov.) (Rs Cr)		Buy	Sell	Net
17-Apr-25		18210	13542	4668
21-Apr-25		11712	9742	1970
22-Apr-25		16703	15412	1290
23-Apr-25		17507	14174	3333
24-Apr-25		24089	15839	8251
Month to date-Apr		231898	237025	(5128)
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
17-Apr-25		13774	15780	(2006)
21-Apr-25		15620	15373	247
22-Apr-25		15154	16040	(886)
23-Apr-25		15151	16385	(1234)
24-Apr-25		13452	13987	(535)
Month to date-Apr		214971	196261	18710
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
16-Apr-25		2715	4112	(1397)
17-Apr-25		1095	1366	(272)
21-Apr-25		3227	3244	(18)
22-Apr-25		1924	2609	(685)
23-Apr-25		907	2986	(2079)
Month to date- Apr		42246	66059	(23814)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1887	46%	1378	47%
Decline	2063	50%	1474	51%
Unchanged	136	3%	64	2%

Market Turnover	24-Apr	23-Apr	Var (%)
BSE Cash	5930	6784	-13%
NSE Cash	108519	116245	-7%
NSE Futures	295659	361028	-18%
NSE Options	48294226	27051794	79%
Total (Rs.Cr)	48704334	27535851	77%

Volatility Index	24-Apr	23-Apr
Volatility Index	16.25	15.96

Index PE - TTM	24-Apr	Yr. High	Yr. Low
Sensex	22.2	25.2	20.3
Nifty	21.9	24.4	19.6

Corporate News
Powergrid begins commercial operations at 85 MW Nagda solar plant

Powergrid on Thursday said the commercial operations have started at its 85 MW solar plant in Nagda, Madhya Pradesh. The solar project has been set through its wholly owned subsidiary, namely Powergrid Energy Services Ltd, the company said in a regulatory filing. (NDTV)

CONCOR, GAIL sign MoU to develop LNG infrastructure for green logistics

Container Corporation of India Ltd (CONCOR), Ministry of Railways, and GAIL (India) Ltd, Ministry of Petroleum & Natural Gas have signed a Memorandum of Understanding (MoU) on 23rd April 2025 at New Delhi in the presence of Shri Sanjay Swarup, CMD CONCOR, Shri Sanjay Kumar, Director (Marketing), GAIL (India) Ltd and other senior officers from CONCOR and GAIL. (ET)

PB Fintech Invests Rs 539 Crore In Subsidiary

PB Fintech Ltd. has invested Rs 539.4 Cr in its subsidiary PB Healthcare Services Pvt. as part of the first round of seed funding, where the company and other investors are contributing a total of Rs 1,461.6 Cr, according to an exchange filing on Thursday. (ET)

Economy
Indian firms should avoid re-routing of goods from China to US: GTRI

Domestic exporters should not use India as a destination for re-routing goods originating from high-tariff countries like China to the US, economic think tank GTRI said on Thursday. Instead of re-routing, Indian exporters should build genuine value addition, supply chain transparency, and adhere to US customs rules. (ET)

RBI caps FEMA violation penalty at Rs 2 lakh to ease compliance burden

RBI has capped the penalty amount for FEMA violations to Rs 2 lakh, down from a percentage of the amount of violations earlier in an easing of regulations. Violations including use of liberalised remittance scheme (LRS) proceeds not reinvested within 180 days. (ET)

International
Trade tensions are giving Intel's older chips a second life

A Sino-U.S. trade war that threatens Intel (NASDAQ:INTC)'s revenue from its biggest market, China, has become an unlikely driver of demand for the embattled chipmaker's older generation of personal computer and server chips, company executives said on Thursday. (Invst)

Top 5 Nifty Gainers	24-Apr	23-Apr	Var(%)
INDUSINDBK	820	794	3.2%
ULTRACEMCO	12159	11949	1.8%
GRASIM	2729	2686	1.6%
TATAMOTORS	668	660	1.3%
DRREDDY	1201	1186	1.2%
Top 5 Nifty Losers	24-Apr	23-Apr	Var(%)
HINDUNILVR	2325	2424	-4.1%
BHARTIARTL	1846	1882	-1.9%
EICHERMOT	5651	5740	-1.6%
ICICIBANK	1403	1424	-1.5%
ETERNAL	236	239	-1.2%

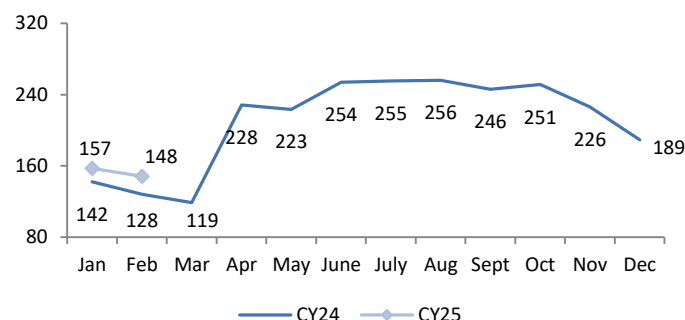
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	79801	-0.4%	3.6%	2.3%	7.3%
MIDCAP	43590	-0.2%	4.4%	4.0%	5.7%
SMLCAP	49267	0.0%	3.3%	4.7%	4.6%
AUTO	50112	-0.2%	5.6%	2.8%	-0.3%
BANKEK	63007	-0.3%	3.7%	5.8%	14.6%
Capital Goods	62803	0.0%	3.5%	0.5%	-0.7%
FMCG	20714	-0.8%	1.4%	7.3%	5.6%
Health Care	42930	0.6%	3.9%	2.2%	21.7%
IT	34803	-0.1%	5.9%	-6.0%	1.2%
METAL	29557	0.3%	3.3%	-4.5%	-5.9%
Oil & Gas	26231	-0.2%	3.4%	4.5%	-9.1%
Power	6880	-0.2%	3.3%	4.0%	-2.7%
Realty	6858	-1.4%	5.2%	2.4%	-9.4%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	68594	1.4%	1.9%	1.0%	-15.8%
Fresh Exposure	6055	-5.0%	14.5%	-4.4%	55.5%
Exposure liquidated	6092	12.3%	30.1%	0.3%	56.3%
Closing Net scripwise outstanding	68558	-0.1%	1.0%	0.6%	-15.8%

NSE USD Futures	24-Apr	23-Apr	Var (%)
Apr Expiry (Rs./\$)	87.95	87.95	0.0%
May Expiry (Rs./\$)	85.32	85.19	0.2%
Total Turnover (Rs. Cr)	4233	6192	-32%

Sectors	TTM PE
Auto	28.82
Auto Ancillary	39.83
Banking	13.89
Engineering	50.01
Cement	74.58
Diamonds & Jewellery	42.02
Housing Finance	25.31
Infrastructure & Const	26.94
Metals-Aluminium	25.59
Metal – Steel	16.8
Oil Expl.	7.42
Pharma	9.16
Power – Gen. Supp.	38.75
Information Tech.	29.09
Sugar	18.28
Telecom Serv. Prov.	49.32
Tyres	29

North India Tea Prices (Rs/Kg) (Source: teaboard.gov.in)



10 year G-Sec Yield	Current	Previous	Change
US	4.31%	4.31%	(1) bps
Japan	1.35%	1.33%	2 bps
India	6.32%	6.33%	(1) bps
UK	4.50%	4.55%	(5) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	678	678	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)	883	688	194.5

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	17.36	10165912	17.23	12569332	0.75%	1	1480.29	1471.40	0.6%
Wipro	2.85	7233373	2.83	10995303	0.71%	1	243.02	242.75	0.1%
Dr.Reddy's	14.00	2094456	13.68	2969465	2.34%	1	1193.78	1200.50	-0.6%
ICICI Bank	33.21	5266177	33.27	7834850	-0.18%	2	1415.91	1402.70	0.9%
HDFC Bank	72.00	4121658	72.29	4301814	-0.40%	3	2046.48	1916.80	6.8%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	38.80	38.50	0.3	0.8%
RIL	60.70	60.00	0.7	1.2%
SBI	94.90	94.30	0.6	0.6%

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%	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 Apr
US Inflation Data	13 May
US GDP	30 Apr
US Unemployment Data	02 May
US Fed Rate	07 May
China GDP	15 Jul
China Inflation Data	10 May

Event Update

Name	Date	Purpose
AMI Organics Ltd.	25/04/25	Stock Split from Rs.10/- to Rs.5/-
Muthoot Finance Ltd.	25/04/25	Interim Dividend
Sanofi India Ltd.	25/04/25	Rs.117.00 per share(1170%)Final Dividend

Bulk Deal As On 24/04/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
523120	ADORMUL	PRIYA A VENKATARAMAN	S	30230	80.74
539770	DARJEELING	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	39063	32.76
539770	DARJEELING	YASHIV HOLDINGS PRIVATE LIMITED	S	37000	32.76
539190	DFL	JATIN MANUBHAI SHAH	S	17526	48
539190	DFL	JATIN MANUBHAI SHAH HUF	B	17526	48
543516	DHYANITR	BHAVIN INDRAJIT PARIKH	B	123200	15.26
521137	EUREKAI	MONIKA SEKHRI	S	98600	9.58
508980	FRONTCAP	M7 GLOBAL FUND PCC - CELL DEWCAP FUND	B	430324	18.65
508980	FRONTCAP	SHREYASH ANIL PARIKH	S	115685	18.65
508980	FRONTCAP	SUDHIR S MEHTA HUF	S	352083	18.63
530663	GOYALASS	BEEMIDI MADHUSUDHAN REDDY	S	360001	1.4
526967	HEERAISP	DIVYANG HIMATLAL SHAH	B	41774	8
539449	IGCIL	NISHA CHINTU CHUGH	S	455634	5.86
540134	IISL	JYOTI AJAY KUMAR GUPTA	B	38990	7.18
531778	KACHCHH	KHUSHBOO R SHAH	B	37700	34.59
531778	KACHCHH	MILLENNIUM STOCK BROKING PVT LTD	S	36000	35.07
531778	KACHCHH	TUSHAR SHAMJIBHAI PATEL	B	28000	34.96
500240	KINETICENG	ANIL LAXMICHAND SHAH	B	246979	180.9
500240	KINETICENG	RELIANCE CORPORATE ADVISORY SERVICES LIMITED	S	256415	180.88
505523	MAHACORP	SANDARV TRADING PRIVATE LIMITED	S	3617494	0.54
513119	ONIXSOLAR	AMIN ABDULBHAI NAYANI	B	13500	253.67
544383	PPARIVAH	SHARE INDIA SECURITIES LIMITED	B	99600	99.58
544392	SPINAROO	KARNIKA INDUSTRIES LIMITED	B	50000	72.05
539117	SUJALA	YAKSHIT FINANCE LIMITED	S	50000	69.42
542025	SUNRETAIL	PRASHANT KUMAR SINGH	B	816000	0.64
542803	VEL	BHAVIN KANJIBHAI CHARIA	B	60000	13
542803	VEL	JAIMIN KAILASH GUPTA	S	55800	13
542803	VEL	KRESHA KAILASH GUPTA	S	56000	13
542803	VEL	NIKHIL KUMAR GUPTA	S	43000	13
542803	VEL	VIPUL DASHRATHBHAI MEGHA	B	100000	13
514348	WINSOME	RAJESH SHARMA	B	627105	1.71
514348	WINSOME	TROPEX SUPPLIERS PRIVATE LIMITED	S	661384	1.71

NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
AGSTRA	AGS Transact Tech Ltd	BAJAJ FINANCE LIMITED	SELL	12058807	5.52
AGSTRA	AGS Transact Tech Ltd	ISHAAN TRADEFIN LLP	BUY	3800000	5.53
AGSTRA	AGS Transact Tech Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	2500000	5.52
AGSTRA	AGS Transact Tech Ltd	SETU SECURITIES PVT LTD	BUY	1000000	5.52
GATECH	GACM Technologies Limited	MOOLCHAND KIRAN KUMAR JAIN	SELL	4188991	0.76
GATECH	GACM Technologies Limited	TEUDDY TECHNOLOGY PRIVATE LIMITED	SELL	10103890	0.77
GATECHDVR	GACM Technologies Limited	TEUDDY TECHNOLOGY PRIVATE LIMITED	SELL	2425000	0.95
NITCO	Nitco Limited	KAMATH ASSOCIATES	BUY	700000	131
NITCO	Nitco Limited	LEADING LIGHT FUND VCC THE TRIUMPH FUND	SELL	424293	131
ONYX	Onyx Biotech Limited	ZETA GLOBAL FUNDS (OEIC) PCC LIMITED-ZETA SERIES B FUND PC	BUY	98000	49.95
RAPIDFLEET	Rapid Fleet Mgt Service L	MLB STOCK BROKING PRIVATE LIMITED	SELL	51000	211.13
TPHQ	Teamo Productions HQ Ltd	KIWI DEALCOM PRIVATE LIMITED	SELL	5736576	1.04

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