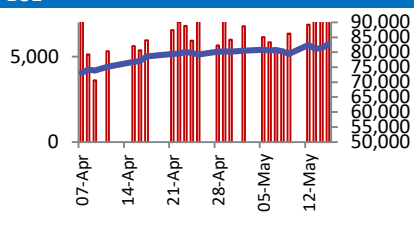
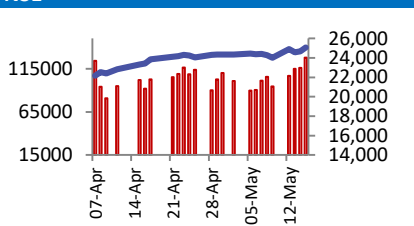


BSE	NSE
	
Open 81354 High 82718 Low 80762 Close 82531 Change 1200 Volume (Lacs) 8490 Turnover (Rs.inCr) 7970	Open 24694 High 25116 Low 24494 Close 25062 Change 395 Volume(Lacs) 42585 Turnover(Rs.in Cr) 127891

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	42323	42051	272	0.6%
Dow Futures	42397	42385	12	0.0%
Nasdaq	19112	19147	(34)	-0.2%
FTSE	8634	8585	49	0.6%
Nikkei	37659	37756	(96)	-0.3%
Hang Seng	23237	23453	(216)	-0.9%
Gift Nifty	25187	25079	109	0.4%
Straits Singapore	3886	3892	(6)	-0.2%
South Korea	2623	2621	2	0.1%
Taiwan	21821	21730	90	0.4%
Shanghai	3361	3381	(20)	-0.6%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9577	9607	(30)	-0.3%
Alumin (\$/MT)	2489	2529	(40)	-1.6%
Zinc (\$/MT)	2725	2765	(41)	-1.5%
Brent Crude (\$/bbl)	65	65	0	0.2%
Gold (\$/Ounce)	3215	3240	(25)	-0.8%
Silver (\$/Ounce)	32	33	(0)	-0.5%
Light Crude (\$/bbl)	62	62	0	0.3%
N G (\$/mmbtu)	3	3	(0)	-0.2%
Sugar (\$/MT)	493	504	(11)	-2.2%
Rubber (Rs./kg)	197	196	1	0.3%
Baltic Dry Index	1305	1267	38	3.0%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	85.55	85.28	0.32%
Rs./ Euro	95.84	95.97	-0.13%
Rs./Chinese Yuan	11.88	11.87	0.08%
Yen / \$ rate	145.38	145.67	-0.20%
\$ US/Euro	1.12	1.12	0.14%

Dollar Index	Current	Previous	Var(%)
Dollar Index	100.66	100.88	-0.22%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	25000	55200
Support 2	24940	55000
Resistance	25170	55640

Securities in Ban For Trade	
CDSL	MANAPPURAM
HINDCOPPER	

Market Review

US: Wall Street stocks ended mixed with gains in Cisco Systems following an upbeat forecast, while UnitedHealth tumbled after a report of a criminal investigation into the insurer.

Asia: Asian markets traded mixed on Friday after Japan's GDP data and ahead of other economic data from the region.

India: On Thursday, the Indian stock market ended with stellar gains led by buying across the board, with the benchmark Nifty 50 closing above the 25,000-mark. **Market is expected to open on a gap up note and likely to witness positive move during the day.**

Global economy US producer inflation unexpectedly fell in April. The producer price index (PPI) contracted by 0.5% in April from a month earlier. This was below the Briefing.com's market consensus, which expected a 0.3% rise in prices from March.

US retail sales growth slowed in April. Retail sales edged up 0.1% last month after an upwardly revised 1.7% surge in March. Economists polled by Reuters had forecast retail sales, which are mostly goods and are not adjusted for inflation, unchanged after a previously reported 1.5% jump in March.

Japan's economy shrank for the first time in a year in the March quarter at a faster pace than expected, Reuters reported. Real GDP contracted an annualised 0.7% in January-March, much bigger than a median market forecast for a 0.2% drop. It followed a revised 2.4% increase in the previous quarter. On a QoQ basis, Japan's economy shrank 0.2% compared with market forecasts for a 0.1% contraction.

Commodities: Oil prices were little changed in Asian trading on Friday after sharp declines in the previous session, as expectations of a nuclear deal between Iran and the U.S. sparked oversupply concerns.

Gold prices eased on Friday and were poised for their steepest weekly decline in six months, as a stronger dollar and waning trade war concerns dampened its appeal as a safe-haven asset.

Currency: The dollar fell in tandem with US Treasury yields on Friday after downside surprises on US economic data this week cemented bets of more Federal Reserve rate cuts this year.

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	51012	9254	29730	5296	3958	153567	27121	148321	25815	5246	1306
Index Option	24900209	4616686	24839380	4610106	6580	2287684	414170	3253603	587174	(965919)	(173004)
Stock Future	453171	29523	353172	22689	6834	5977270	384414	5959543	378384	17727	6030
Stock Option	1245413	84179	1250412	84317	(138)	1537264	98803	1480917	93943	56347	4860
Total	26649805	4739642	26472694	4722408	17234	9955785	924508	10842384	1085316	(886599)	(160808)

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
7-May-25	16404	13452	2952
8-May-25	22515	20088	2427
9-May-25	24263	26651	(2388)
13-May-25	17669	17505	164
14-May-25	15095	14165	931
Month to date- May	137947	125247	12700
FII (Prov.) (Rs Cr)	Buy	Sell	Net
9-May-25	11483	15281	(3799)
12-May-25	12775	11529	1246
13-May-25	17231	17708	(477)
14-May-25	14861	13929	932
15-May-25	21412	16019	5393
Month to date-May	157467	142515	14952
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
9-May-25	15547	8269	7278
12-May-25	14684	13236	1448
13-May-25	16552	12278	4274
14-May-25	13603	13287	316
15-May-25	14750	16418	(1668)
Month to date-May	139774	121663	18111
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
7-May-25	2657	4078	(1421)
8-May-25	4468	2949	1519
9-May-25	2825	2939	(115)
13-May-25	1705	4200	(2495)
14-May-25	2317	3989	(1672)
Month to date- May	20607	25103	(4495)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2615	64%	1970	68%
Decline	1350	33%	882	30%
Unchanged	150	4%	57	2%

Market Turnover	15-May	14-May	Var (%)
BSE Cash	7970	8395	-5%
NSE Cash	127891	115869	10%
NSE Futures	164029	119880	37%
NSE Options	61755243	23807580	159%
Total (Rs.Cr)	62055132	24051724	158%

Volatility Index	15-May	14-May
Volatility Index	16.89	17.23

Index PE - TTM	15-May	Yr. High	Yr. Low
Sensex	23.0	25.2	20.3
Nifty	22.4	24.4	19.6

Corporate News

IndusInd Bank finds more discrepancies in Internal Audits, reveals whistle-blower complaint

The bank's internal audit department, while conducting a review of the bank's microfinance institution business, noted that a cumulative amount of Rs 674 crore was incorrectly recorded as interest over three quarters of fiscal 2024-2025, which was fully reversed as on Jan 10, 2025, and found Rs 595 crore unsubstantiated balances in "other assets" account. (NDTV)

Alkem Labs reports 'fraudulent transfer' of Rs 52 crore Arm Enzene Biosciences has detected a cybersecurity incident affecting its US unit where some employees' business email IDs were compromised, resulting in a fraudulent transfer of funds. (NDTV)

L&T has entered an amendment pact to limit the secondary acquisition of stake in E2E Networks to 2.98%

The company has entered an amendment pact to limit the secondary acquisition of stake in E2E Networks to 2.98% and has acquired 5.95 lakh shares of E2E Networks via secondary acquisition from a promoter, now holding 18.99% in the company. (NDTV)

Economy

India's trade deficit expands to \$26.42 bn in April

India's trade deficit significantly widened to \$26.42 billion in April, exceeding economists' expectations due to a surge in imports. Imports rose by 19.12% to \$64.91 billion compared to the previous year, while exports increased by 9.03% reaching \$38.49 billion. (ET)

India's proposal to impose retaliatory duty on US goods to figure in trade talks

India's proposal for retaliatory duties on US goods, prompted by American steel and aluminium tariffs, will be a key topic in upcoming trade talks starting May 17. An official emphasized this as a pragmatic approach within WTO norms, reserving India's right to retaliate while prioritizing negotiation. (ET)

International

China's NetEase surges to over 4-yr high on strong quarterly earnings

Shares of NetEase Inc surged more than 15% on Friday, hitting their highest level in over four years, after the Chinese gaming giant reported solid first-quarter earnings driven by strong demand for its new and existing games. (Invst)

Top 5 Nifty Gainers	15-May	14-May	Var(%)
HEROMOTOCO	4325	4067	6.3%
JSWSTEEL	1038	989	5.0%
TATAMOTORS	728	699	4.2%
TRENT	5578	5362	4.0%
HCLTECH	1696	1638	3.6%
Top 5 Nifty Losers	15-May	14-May	Var(%)
INDUSINDBK	781	781	-0.1%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	82531	1.5%	2.7%	7.1%	12.0%
MIDCAP	44626	0.7%	5.9%	6.9%	5.4%
SMLCAP	50450	0.9%	7.6%	5.8%	7.5%
AUTO	53323	1.9%	5.0%	12.4%	2.3%
BANKEX	63064	1.1%	2.1%	3.8%	15.1%
Capital Goods	67802	1.3%	9.7%	11.8%	3.1%
FMCG	20680	0.6%	1.8%	1.2%	4.4%
Health Care	42564	0.7%	3.1%	3.0%	20.2%
IT	37665	1.3%	6.8%	14.6%	9.4%
METAL	31059	1.6%	8.7%	8.6%	-2.9%
Oil & Gas	27247	1.0%	3.9%	7.5%	-4.2%
Power	6722	1.0%	4.4%	1.0%	-10.4%
Realty	6956	1.9%	6.5%	6.7%	-9.6%

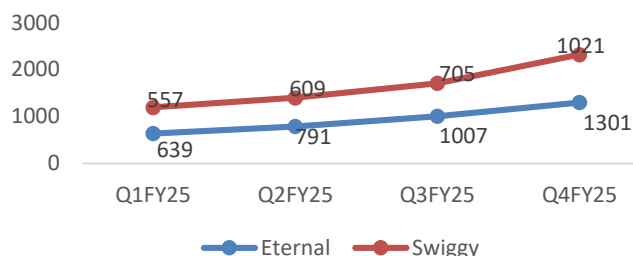
Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	69310	1.4%	0.1%	1.3%	-11.4%
Fresh Exposure	6875	3.8%	54.1%	62.7%	85.2%
Exposure liquidated	6487	13.8%	29.8%	34.1%	26.3%
Closing Net scripwise outstanding	69698	0.6%	1.4%	2.8%	-9.3%

NSE USD Futures	15-May	14-May	Var (%)
Apr Expiry (Rs./\$)	87.56	87.56	0.0%
May Expiry (Rs./\$)	87.50	87.50	0.0%
Total Turnover (Rs. Crore)	2844	2912	-2%

Sectors	TTM PE
Auto	29.59
Auto Ancillary	40.71
Banking	13.48
Engineering	46.23
Cement	74.74
Diamonds & Jewellery	40.16
Housing Finance	24.14
Infrastructure & Const	27.9
Metals-Aluminium	26.01
Metal – Steel	16.54
Oil Expl.	7.52
Pharma	8.96
Power – Gen. Supp.	38.61
Information Tech.	25.72
Sugar	18.07
Telecom Serv. Prov.	47.91
Tyres	30.94

No of Dark Stores of Quick Commerce Players (Source: NBRR)

Dark Stores of Quick Commerce Players



10 year G-Sec Yield	Current	Previous	Change
US	4.42%	4.43%	(1) bps
Japan	1.48%	1.48%	0 bps
India	6.27%	6.29%	(1) bps
UK	4.66%	4.71%	(5) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	686	686	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)	1741	1696	44.5

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	18.72	8079156	18.46	8648376	1.41%	1	1601.50	1613.00	-0.7%
Wipro	3.00	4527941	2.97	2968836	1.01%	1	256.65	256.57	0.0%
Dr.Reddy's	14.39	1150482	14.14	1433096	1.77%	1	1231.06	1236.30	-0.4%
ICICI Bank	34.01	6255232	33.36	4181833	1.95%	2	1454.78	1450.80	0.3%
HDFC Bank	73.33	2586808	71.66	1844560	2.33%	3	2091.13	1933.80	8.1%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	42.20	41.95	0.3	0.6%
RIL	67.90	67.00	0.9	1.3%
SBI	92.80	94.20	(1.4)	-1.5%

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
Atul Ltd.	16-05-25	Rs.25.00 per share(250%)Final Dividend
Axis Bank Ltd.	16-05-25	Rs.1.00 per share(50%)Final Dividend
Bajaj Finance Ltd.	16-05-25	Rs.44.00 per share(2200%)Final Dividend
Bajaj Finserv Ltd.	16-05-25	Rs.1.00 per share(100%)Final Dividend
Bank Of Baroda	16-05-25	Rs.8.35 per share(417.5%)Final Dividend
Bombay Dyeing And Manufacturing Company Ltd.	16-05-25	Rs.1.20 per share(60%)Final Dividend
BSE Ltd.	16-05-25	Dividend
Cholamandalam Investment and Finance Company Ltd.	16-05-25	Rs.0.70 per share(35%)Final Dividend

Bulk Deal As On 15/05/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539900	DIDL	DULCET ADVISORY PRIVATE LIMITED	S	107571	10.84
539405	DITCO	SHASHANK CHOUDHARY	B	30100	12.23
530663	GOYALASS	BEEMIDI MADHUSUDHAN REDDY	S	261000	1.21
523277	GVFILM	LAXMANBHAI MAFABHAI CHAUDHARI	S	30262750	0.36
523277	GVFILM	LAXMANBHAI MAFABHAI CHAUDHARI	B	88559	0.39
505336	HARSHILAGR	SAJM GLOBAL IMPEX PRIVATE LIMITED	S	11872647	2.23
505336	HARSHILAGR	STROTRAM GLOBE PRIVATE LIMITED	S	6421053	2.26
505336	HARSHILAGR	STROTRAM GLOBE PRIVATE LIMITED	B	184960	2.25
505336	HARSHILAGR	VAKANDA SERVICES PRIVATE LIMITED	S	1182101	2.26
505336	HARSHILAGR	VAKANDA SERVICES PRIVATE LIMITED	B	5069558	2.25
531968	IITLPROJ	ALANKIT IMAGINATIONS LIMITED	B	43500	51.6
531968	IITLPROJ	PARDEEP KUMAR AGGARWAL HUF	S	43400	51.6
544160	JAYKAILASH	NEEL NARENDRABHAI PUJARA	S	62400	63.22
532397	KONNDOR	JIMITKUMAR DILIPKUMAR SANGHVI	B	29000	10.83
532397	KONNDOR	RIYA VINIT AGRAWAL	S	100000	10.83
532397	KONNDOR	VINIT KUMAR P AGRAWAL	S	140000	10.83
532397	KONNDOR	YASHASHRI SUBODH JADHAV	B	220000	10.83
543364	MARKOLINES	ALMONDZ GLOBAL SECURITIES LIMITED.	S	131200	151.5
526251	MIDEASTP	DIVYABEN DILIPBHAI PATEL	B	73000	20.5
526251	MIDEASTP	KIRANKUMAR MANUBHAI PATEL	B	136000	20
526251	MIDEASTP	KISHOR AMICHAND SHAH	S	223041	20.16
540809	MRCAGRO	GAURAV SINGH	S	136500	15.77
542724	MURAE	GAUTAM RAJ	S	5717310	1.55
542724	MURAE	GAUTAM RAJ	B	4960925	1.54
544292	ONESOURCE	MEDELLA HOLDINGS PTE. LTD.	S	884210	1568.04
513119	ONIXSOLAR	D3 STOCK VISION LLP	B	14601	176.83
513119	ONIXSOLAR	DIVYESHKUMAR MANSUKHLAL SAVALIYA	B	39400	177.58
513119	ONIXSOLAR	GOPALKUMAR BHIKHALAL BALDHA	S	187249	176.48
513119	ONIXSOLAR	KAJAL GOPAL BALDHA	S	186993	176.72
513119	ONIXSOLAR	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	B	50000	177.3
513119	ONIXSOLAR	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	17500	176.55
513119	ONIXSOLAR	ONIX RENEWABLE LIMITED	B	282942	180.61
513119	ONIXSOLAR	PUNITBHAI BAVANJIBHAI LAKKAD	S	88261	192.52
513119	ONIXSOLAR	SAVALIYA PIYUSHKUMAR MANSUKHBHAI	B	29700	177.47
513119	ONIXSOLAR	SETU SECURITIES PRIVATE LIMITED	B	14999	176.6
531512	ORIENTTTR	ALNASIR ABDUL AZIZ GILANI	S	100000	20.16
538452	QUASAR	SATISH VAGHARI	S	4801505	0.91
538452	QUASAR	VAKANDA SERVICES PRIVATE LIMITED	B	2560000	0.91
541703	RACONTEUR	ANJU BAJAJ	S	36800	11.51
512499	SHALPRO	SPARK FINANCE	S	500000	0.49
512499	SHALPRO	SPARK FINANCE	B	5000000	0.49
543244	SHINEFASH	JIGNESH AMRUTLAL THOBHANI	S	28000	364.35
543244	SHINEFASH	SAPPERS INFRA REALTORS PRIVATE LIMITED	S	21000	363.94
539593	SHIVA	SHASHANK CHOUDHARY	B	40300	5.74
511700	STANCAP	DULCET ADVISORY PRIVATE LIMITED	S	13385000	0.4
539117	SUJALA	JOYDEEP COMMOSALES LLP	S	46607	61.29
539117	SUJALA	KRISHAN KUMAR AGARWAL	B	38000	61
531499	SYBLY	GRID TRADING PRIVATE LIMITED	S	81000	4.2
531499	SYBLY	VISAGAR FINANCIAL SERVICES LIMITED	S	47025	4.21

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
CHAMUNDA	Chamunda Electrical Ltd	VIKASA INDIA EIF I FUND-INCUBE GLOBAL OPPORTUNITIES	SELL	165000	43.4
DHARIWAL	Dhariwalcorp Limited	SANJU SHARMA	BUY	46800	144.82
DHARIWAL	Dhariwalcorp Limited	SHREE RAM COLLOIDS PRIVATE LIMITED	SELL	48000	144.83
EASEMYTRIP	Easy Trip Planners Ltd	L7 HITECH PRIVATE LIMITED	SELL	20445675	11.96
GATDVR-RE	GACM Technologies Ltd	K L B SECURITIES PVT LTD	SELL	621951	0.09
GENSOL	Gensol Engineering Ltd	MANSI SHARE AND STOCK ADVISORS PVT LTD	SELL	472042	61.58
GODHA	Godha Cabcon Insulat Ltd	CHANDRESH KANUBHAI PARMAR	SELL	11033486	0.54
INDSWFTLAB	Ind-Swift Labs Ltd.	WILSON HOLDINGS PRIVATE LIMITED	SELL	531872	76.74
IITL	Industrial Inv Trust Ltd	ONE EARTH CAPITAL LIMITED	SELL	888000	170.58
IITL	Industrial Inv Trust Ltd	ONE EARTH CAPITAL LIMITED	SELL	888000	170.58
IITL	Industrial Inv Trust Ltd	SIX SIGMA INVESTMENTS FUND	BUY	888000	170.58
IITL	Industrial Inv Trust Ltd	SIX SIGMA INVESTMENTS FUND	BUY	888000	170.58
INNOMET	Innomet Advanced Materi L	GUTTIKONDA VARA LAKSHMI	BUY	100800	162.75
INNOMET	Innomet Advanced Materi L	SETU SECURITIES PRIVATE LIMITED	SELL	72000	165.6
LLOYDS-RE1	LLOYDS ENG WORKS LTD	LLOYDS ENTERPRISES LIMITED	SELL	3802262	18.51
PAYTM	One 97 Communications Ltr	CITIGROUP GLOBAL MARKETS MAURITIUS PVT LTD	BUY	355000	850.7
PAYTM	One 97 Communications Ltr	GOLDMAN SACHS (SINGAPORE) PTE - ODI	SELL	355000	850.7
SHANTI	Shanti Overseas (Ind) Ltd	VINAY HARRISON	BUY	70000	16.05
TANKUP	Tankup Engineers Limited	UJWAL ARORA	BUY	32000	195.98
VOLERCAR	Volcar Car Limited	JAJODIA EQUITY ADVISORS SERVICES PRIVATE LIMITED	BUY	78400	102.48

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