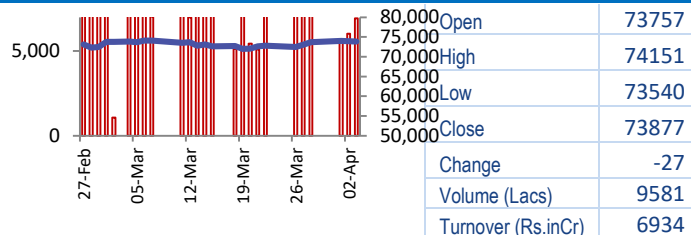
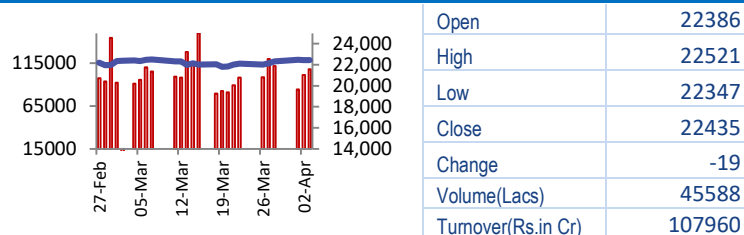


**BSE**



**NSE**



World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	39127	39170	(43)	-0.1%
Dow Futures	39521	39482	39	0.1%
Nasdaq	16277	16240	37	0.2%
FTSE	7937	7935	2	0.0%
Nikkei	40102	39452	650	1.6%
Hang Seng	16725	16725	Closed	Closed
Gift Nifty	22602	22555	47	0.2%
Straits Singapore	3247	3223	24	0.7%
South Korea	2731	2707	24	0.9%
Taiwan	20338	20338	Closed	Closed
Shanghai	3069	3069	Closed	Closed

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9263	8991	271.5	3.0%
Alumin (\$/MT)	2429	2380	49.0	2.1%
Zinc (\$/MT)	2548	2480	68.5	2.8%
Brent Crude (\$/bbl)	89.6	89.4	0.2	0.2%
Gold (\$/Ounce)	2301	2300	1.3	0.1%
Silver (\$/Ounce)	27.2	27.2	0.0	0.0%
Light Crude (\$/bbl)	85.7	85.4	0.2	0.3%
N G (\$/mmbtu)	1.8	1.8	0.0	0.3%
Sugar (\$/MT)	622.9	623.0	(0.1)	0.0%
Rubber (Rs./kg)	185.0	184.0	1.0	0.5%
Baltic Dry Index	1711	1714	(3.0)	-0.2%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.44	83.39	0.06%
Rs./ Euro	89.84	89.58	0.29%
Rs./Chinese Yuan	11.57	11.58	-0.06%
Yen /\$ rate	151.69	151.70	-0.01%
\$ US/Euro	1.08	1.08	0.07%

Dollar Index	Current	Previous	Var(%)
Dollar Index	104.20	104.25	-0.05%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22350	47670
Support 2	22250	47500
Resistance	22550	48140

Securities in Ban For Trade	
HINDCOPPER	SAIL
ZEEL	

**Market Review**

**US:** The S&P 500 and Nasdaq closed higher on Wednesday after data showing the U.S. services industry growth slowed further in March, but the advance was limited after Federal Reserve Chair Jerome Powell indicated a cut in interest was still not in sight.

**Asia:** Asian markets rebounded following a sell-off in the previous session, as investors digest comments from US Federal Reserve Chairman Jerome Powell. Nikkei index up 1.2%, Kospi gained 1% and Straits Times index rose 0.7%.

**India:** The Indian market ended on a flat note in the highly volatile session on April 3. At close, the Sensex was down 27.09 points, or 0.04%, at 73,876.82, and the Nifty was down 18.6 points, or 0.08%, at 22,434.70. Amid weak global cues, the market opened on a negative note but erased all the losses in the initial hours and inched closer to record highs supported by IT, metal, oil & gas, power names. However, selling at final hour erased the intraday gains. **Market is expected to open gap up and likely to witness positive move during the day.**

**Global Economy:** U.S. services industry growth slowed further in March, while a measure of prices paid by businesses for inputs dropped to a four-year low, which bodes well for the inflation outlook. The Institute for Supply Management (ISM) said on Wednesday that its non-manufacturing PMI fell to 51.4 last month from 52.6 in February. It was the second straight monthly decline in the index since rebounding in January.

Hong Kong's retail sales rose for the 15th straight month in February boosted by continuing growth in tourism and consumption. Sales in February rose 1.9% from a year earlier to HK\$33.8 billion (\$4.32 billion), the Hong Kong government said. That compared with 0.9% growth in January, 7.8% rise in December and 15.9% jump in November.

**Commodities:** Gold prices hit record highs in early Asian trade on Thursday, as the yellow metal benefited from weakness in the dollar amid uncertainty over U.S. interest rate cuts, while increased safe haven demand also aided prices.

Oil prices rose to five-month highs in Asian trade on Thursday, extending a rash of recent gains as the prospect of worsening geopolitical conditions in the Middle East presented more potential supply disruptions.

**Currency:** The dollar was pinned beneath recent peaks on Thursday with traders taking remarks from Federal Reserve Chair Jerome Powell as reassuring on the likelihood of interest rate cuts this year while waiting for the latest U.S. labour market readout.

**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	36593	3262	52923	4939	(1677)	255631	23650	243565	22595	12066	1055
Index Option	49245119	3863904	48821289	3834899	29005	2654240	268096	4013156	357862	(1358916)	(89766)
Stock Future	219691	18716	343289	29032	(10316)	3125786	258507	3124434	258664	1352	(157)
Stock Option	395237	35980	398745	36269	(289)	230131	20145	193579	16888	36552	3257
<b>Total</b>	<b>49896640</b>	<b>3921862</b>	<b>49616246</b>	<b>3905139</b>	<b>16723</b>	<b>6265788</b>	<b>570398</b>	<b>7574734</b>	<b>656009</b>	<b>(1308946)</b>	<b>(85611)</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
26-Mar-24	16805	20677	(3871)
27-Mar-24	20870	24041	(3171)
28-Mar-24	19965	15922	4043
1-Apr-24	39848	37493	2355
2-Apr-24	14908	15355	(447)
<b>Month to date-Apr</b>	<b>54756</b>	<b>52848</b>	<b>1908</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
27-Mar-24	19559	17388	2170
28-Mar-24	24809	24620	188
1-Apr-24	8818	9340	(522)
2-Apr-24	13279	14902	(1623)
3-Apr-24	13813	16026	(2214)
<b>Month to date-Apr</b>	<b>35910</b>	<b>40268</b>	<b>(4359)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
27-Mar-24	26387	25189	1198
28-Mar-24	12428	9737	2692
1-Apr-24	10193	8985	1208
2-Apr-24	12163	10211	1953
3-Apr-24	13037	11935	1102
<b>Month to date-Apr</b>	<b>35394</b>	<b>31131</b>	<b>4264</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
26-Mar-24	531	4075	(3545)
27-Mar-24	3610	1127	2482
28-Mar-24	3517	2076	1441
1-Apr-24	5992	1269	4723
2-Apr-24	2628	1633	994
<b>Month to date-Apr</b>	<b>8619</b>	<b>2902</b>	<b>5717</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2777	70%	1877	70%
Decline	1083	27%	716	27%
Unchanged	105	3%	76	3%

Market Turnover	03-Apr	02-Apr	Var (%)
BSE Cash	6934	6033	15%
NSE Cash	107960	101388	6%
NSE Futures	133707	129299	3%
NSE Options	55489426	39846631	39%
Total (Rs.Cr)	55738027	40083351	39%

Volatility Index	03-Apr	02-Apr
Volatility Index	11.37	11.65

Index PE - TTM	03-Apr	Yr. High	Yr. Low
Sensex	25.2	26.0	22.2
Nifty	23.0	28.8	20.3

**Corporate News**

**Vedanta Aluminium expands refining capacity to 3.5 MT**

Vedanta Aluminium has increased its annual alumina refining capacity to 3.5 mt at its Lanjigarh unit in Odisha, up from 2 MTPA. The company plans to further raise alumina refining capacity to 5 MTPA and increase aluminium production capacity to 3 MTPA from the current 2.37 MTPA. This expansion aims to enhance raw material security and reduce costs for the Jharsuguda and BALCO aluminium smelters. (ET)

**Shirdi Sai Electricals makes Rs 15k cr investment to set up solar cell unit**

Shirdi Sai is making initial investment of Rs 15,000 cr to build an integrated solar cell to module manufacturing facility at Ramayapatnam in AP. The investments in the first phase are being made through subsidiary Indosol Solar to set up 5 GW of moduleS, 5 GW wafers, 5 GW ingot and 5 GW glass capacities. The entire project is of 30 GW upstream capacity. It is part of the government's PLI scheme for the solar industry. (BS)

**Union Bank of India raises \$500 mn from overseas market**

The fund was arranged by Dubai Intl Financial Centre. A syndicated term loan of USD 500 mn (USD 400 mn and Green Shoe of USD 100 mn) would be drawn in two tranches with tenure of 3 and 5 years. The first tranche of USD 100 mn was drawn on Wednesday. This is the maiden syndicated term loan raised by Union Bank of India at an overseas centre. (Moneycontrol)

**Economy**

**Private captive, commercial coal mines cross 140 MT production in FY24**

Coal production from mines awarded to private miners for captive and commercial purposes touched 147 MT in FY24. This is a 27 per cent jump over FY23 when their production stood at 116 MT. Dispatch during FY24 was 143 MT against 110 MT in FY23, a growth of 30 per cent. Of the total production of 147.2 MT, power sector captive mines produced around 121.3 MT. Captive mines of the non-power sector produced 8.4 MT and production from commercial mines stood at 17.5 MT. (BS)

**International**

**Ford's pickups, hybrids drive 6.8% rise in first-quarter US sales**

Sales of Ford's Maverick pickup truck surged nearly 82% to 39,061 units as more buyers gravitated toward cheaper vehicles over the past few months amid higher living costs. Ford had also boosted production capacity for the Maverick, late last year to meet the strong demand. The automaker notched overall sales of 508,083, compared with 475,906 a year earlier. Sales of Ford's hybrid vehicles rose 42% to 38,421 units from a year ago, while EVs jumped 86.1%. (Investing)

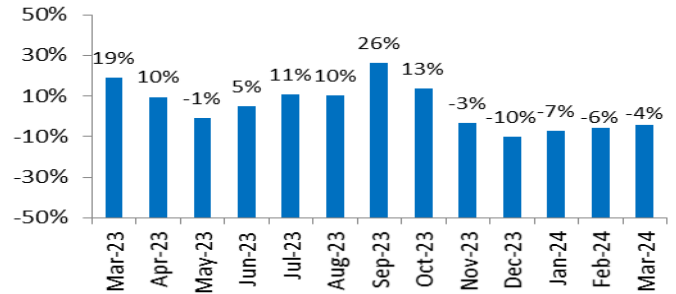
Top 5 Nifty Gainers	03-Apr	02-Apr	Var(%)
SHRIRAMFIN	2556	2466	3.7%
NTPC	351	345	1.9%
DIVISLAB	3685	3623	1.7%
TCS	3947	3884	1.6%
AXISBANK	1063	1047	1.5%
Top 5 Nifty Losers	03-Apr	02-Apr	Var(%)
NESTLEIND	2554	2623	-2.6%
BAJAJ-AUTO	9080	9276	-2.1%
DRREDDY	6124	6238	-1.8%
KOTAKBANK	1731	1757	-1.5%
BRITANNIA	4835	4900	-1.3%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	73877	0.0%	1.9%	0.0%	25.0%
MIDCAP	40671	0.6%	4.1%	1.6%	68.4%
SMLCAP	45556	1.2%	6.6%	0.1%	67.0%
AUTO	49357	-0.4%	2.3%	3.2%	72.3%
BANKEK	53833	0.1%	1.9%	-0.2%	16.3%
Capital Goods	62502	0.1%	5.2%	5.5%	81.2%
FMCG	19388	-0.3%	0.8%	-0.7%	18.0%
Health Care	35455	-0.1%	2.6%	2.0%	61.7%
IT	35892	0.8%	0.8%	-5.5%	26.4%
METAL	29551	0.0%	5.6%	4.3%	53.8%
Oil & Gas	28340	0.4%	3.5%	-1.9%	64.0%
Power	6981	1.2%	6.6%	2.4%	94.3%
Realty	7299	-2.4%	4.2%	-0.2%	133.5%

NSE USD Futures	03-Apr	02-Apr	Var (%)
March Expiry (Rs./\$)	83.49	83.43	0.1%
April Expiry (Rs./\$)	83.58	83.43	0.2%
Total Turnover (Rs. Crore)	35861	35749	0%

Sectors	TTM PE
Auto	32.2
Auto Ancillary	44.5
Banking	15.87
Engineering	39.81
Cement	83.26
Diamonds & Jewellery	42.3
Housing Finance	19.81
Infrastructure & Const	32.43
Metals-Aluminium	42.96
Metal - Steel	16.75
Oil Expl.	17.66
Pharma	12.67
Power – Gen. Supp.	46.76
Information Tech.	20.53
Sugar	13.51
Telecom Serv. Prov.	82.48
Tyres	26.18

### Ashok Leyland Monthly Volume Growth (YoY) (Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.36%	4.35%	1 bps
Japan	0.77%	0.80%	(3) bps
India	7.10%	7.12%	(1) bps
UK	4.06%	4.09%	(3) bps
Libor 3 Mths	5.57%	5.56%	1 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation - WPI	0.20%	0.27%	(7) bps
Inflation - CPI	5.09%	5.10%	(1) bps

India GDP	Q3FY24	Q2FY24	Var(%)
Growth	8.36%	7.60%	76 bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.50%	6.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.50%	4.50%	0 bps
O/S Banking System Liquidity (Rs bn)	1439	670	769.8

IIP Growth %	Jan-24	Jan-23	Apr-Feb
IIP	3.8	5.8	6.0
Mining	5.9	9.0	8.5
Manufacturing	3.2	4.5	5.7
Electricity	5.6	12.7	7.0



**Bulk Deal As On 03/04/24**

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
513119	ABCGAS	KAJAL GOPAL BALDHA	S	2	63.25
513119	ABCGAS	KAJAL GOPAL BALDHA	B	13755	66.66
513119	ABCGAS	TANVIBEN MANOJKUMAR PANDYA	S	11600	66.81
512149	AVANCE	ADAN TRADERS LLP	S	37439910	1.32
512149	AVANCE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	23700000	1.32
543439	BRANDBUCKET	MINIBOSS CONSULTANCY PRIVATE LIMITED	S	162000	12.17
538817	CAPPIPES	NAVEEN GUPTA	S	803439	17.16
538817	CAPPIPES	NAVEEN GUPTA	B	792894	17.05
538817	CAPPIPES	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	S	1350855	17.37
538817	CAPPIPES	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	B	1350855	17.25
544151	CHATHA	AUGMENTA VALUE TRUST - SCHEME 1	S	120000	76.13
544151	CHATHA	VARSU INDIA GROWTH STORY SCHEME 1	S	144000	76.24
544151	CHATHA	VINEY EQUITY MARKET LLP	B	120000	76.26
539596	DELTA	LIVELY EQUIPMENTS SUPPLIERS PRIVATE LIMITED	S	33102	29.56
539596	DELTA	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	B	40274	29.56
543594	DPL	CHANDAN CHAURASIYA	S	279000	10.18
543594	DPL	CHANDAN CHAURASIYA	B	27000	10.04
540190	FRANKLININD	POONAM M RUIA	S	200000	5.28
504397	GANHOLD	RAJ DEVANGBHAI PATEL	B	3940	85.95
504397	GANHOLD	URVASHI UMESHBHAI PATEL	S	3940	85.95
544156	GCONNECT	MAKWANA DIXIT CHANDUBHAI	B	36000	42
544156	GCONNECT	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	B	147000	44.08
544156	GCONNECT	RCSPL SHARE BROKING PRIVATE LIMITED	S	24000	44.1
544156	GCONNECT	SANJAY KARANRAJ SAKARIA	B	69000	42
544156	GCONNECT	SANJAY POPATLAL JAIN	B	30000	42
544156	GCONNECT	STEPTRADE REVOLUTION FUND	B	219000	42.15
531592	GENPHARMA	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	3700994	2.57
531592	GENPHARMA	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	500000	2.57
542918	GIANLIFE	ARUN KUMAR GUPTA	S	141371	21.97
531913	GOPAIST	PRIYANKA AGRAWAL	S	29998	7.22
531913	GOPAIST	SUTHARAPU SHAKEELA SULTHANA	B	28802	7.22
513337	GUJTLRM	PRADEEP BABULAL SHAH	S	498500	46.87
513337	GUJTLRM	VIKI JAYESHKUMAR SHAH	S	400000	46.87
504731	IBRIGST	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	33181	112.25
504731	IBRIGST	VIVEK GAUR	B	8000	112.25
536709	INDRENEW	DAKSH AGARWAL	B	100001	20.5
536709	INDRENEW	HARNISH NITIN BRAHMBHATT	S	82440	21
536709	INDRENEW	NANDANVAN INVESTMENTS LIMITED	B	270000	20.76
536709	INDRENEW	PRAKASH SEVANTILAL SHAH HUF	S	160000	20.5
536709	INDRENEW	SHASHI KALA GILADA	S	84885	20.8
524614	INDXTRA	VIVEKLAKRA	S	818661	7.09
521238	KDL	GLASTON MARIO MENEZES	S	5000	150.25
521238	KDL	MINABEN KIRITBHAI SHAH	B	10744	150.25
521238	KDL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	7679	150.25
524174	KESARPE	CHETAN RASIKLAL SHAH	S	789617	9.79
524174	KESARPE	SETU SECURITIES PVT LTD	B	789617	9.79
505523	MAHACORP	ANKIT MAHENDRABHAI PARLESHA	S	3800000	1.13
539938	MIL	BLISS ENTERPRISE	S	150000	42.69
539938	MIL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	80000	41.73
543400	OMNIPOTENT	MAYANKUMAR CHANDULAL SHAH	S	88000	7.82

543400	OMNIPOTENT	VARUNKUMAR RAMESHKUMAR SHAH	B	96000	8.51
544074	SBVCL	VARSU INDIA GROWTH STORY SCHEME 1	S	49200	158.91
531370	SPAR	ATOR ADVISERS PRIVATE LIMITED	S	196493	20.19
513575	STERPOW	PARAM KAMLESH KAPADIA	S	31951	17.03
539310	THINKINK	B B COMMERCIAL LTD	S	148571	39.79
539310	THINKINK	BOFA SECURITIES EUROPE SA	B	600000	39.79
542923	TRANWAY	PUSHPA BHAJU	S	60000	7.38
542923	TRANWAY	SUBRAMANIAN ELANGKUMARAN	B	70000	7.38
539097	URSUGAR	SAROJ GUPTA	B	450000	16.01
517393	VINTRON	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	397260	23.01
544157	VRUDDHI	DHIREN RAMNIKAL SHETHIA	B	30000	74.22
544157	VRUDDHI	EMINENCE GLOBAL FUND PCC- EUBILIA CAPITAL PARTNERS FUND I	S	160000	74.55
544157	VRUDDHI	EPITOME TRADING AND INVESTMENTS	B	14000	74.55
544157	VRUDDHI	GITA M MEHTA	B	96000	73.59
544157	VRUDDHI	GREEN PEAKS ENTERPRISES LLP	B	30000	74.55
544157	VRUDDHI	KALPANA MADHANI SECURITIES PRIVATE LIMITED	B	14000	74.55
544157	VRUDDHI	KANTA ANANTRAI DESAI	B	16000	73.41
544157	VRUDDHI	RAMNIKAL KUVARJEE SHETHIA	B	30000	74.22
544157	VRUDDHI	SANJAY POPATLAL JAIN	B	20000	71
544157	VRUDDHI	VISIONARY VALUE FUND	S	100000	74.55

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ASPIRE	Aspire & Innovative Adv L	BORANA RAJKUMAR MANGILAL	BUY	76000	56.5
ASPIRE	Aspire & Innovative Adv L	JAIN SANJAY POPATLAL	BUY	350000	56.5
ASPIRE	Aspire & Innovative Adv L	MONEYWISE FINANCIAL SERVICES PRIVATE LTD	SELL	178000	56.5
ASPIRE	Aspire & Innovative Adv L	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	SELL	108000	56.54
BLUEPEBBLE	Blue Pebble Limited	AMIT R AGARWAL	BUY	24000	199
BLUEPEBBLE	Blue Pebble Limited	DEEPAK JUGALKISHORE CHOKHANI	BUY	20800	196.71
BLUEPEBBLE	Blue Pebble Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	20800	189.05
BLUEPEBBLE	Blue Pebble Limited	SANDEEP SINGH	BUY	32000	199
BLUEPEBBLE	Blue Pebble Limited	SATYA VIBHU MUPPANA	BUY	25600	199
BLUEPEBBLE	Blue Pebble Limited	SAURABH TRIPATHI	BUY	32800	196.46
BLUEPEBBLE	Blue Pebble Limited	VINEY EQUITY MARKET LLP	BUY	24000	199
EDELWEISS	Edelweiss Fin Serv Ltd	CLSA GLOBAL MARKETS PTE LTD	BUY	27210507	69.16
EDELWEISS	Edelweiss Fin Serv Ltd	THE PABRAI INVESTMENT FUND IV LP	SELL	27208207	69.15
INDSWFTLAB	Ind-Swift Labs Ltd.	ANIL LAXMICHAND SHAH	SELL	676972	109.86
INDSWFTLAB	Ind-Swift Labs Ltd.	NIVL ADVISORS PRIVATE LIMITED	BUY	306367	104.61
KTL	Kalahridhaan Trendz Ltd	PANKAJKUMAR JAYANTILAL PATEL	BUY	513000	48.7
KTL	Kalahridhaan Trendz Ltd	VEER VIKAS SORATHIYA	BUY	93000	45.04
MADHUSUDAN	Madhusudan Masala Limited	ARUNA R JAIN	SELL	118000	101.98
MAKS	Maks Energy Sol India Ltd	MALANI WEALTH ADVISORS PRIVATE LIMITED	BUY	45000	63.08
MAKS	Maks Energy Sol India Ltd	PREMKUMAR RAM KRISHNA PANDEY	SELL	45000	63.08
MEDIASSIST	Medi Assist Health Ser L	EDELWEISS BROKING LIMITED	SELL	482641	500.02
MOLDTECH	Mold-Tek Technologies Ltd	GUTTUKONDA VARA LAKSHMI	BUY	150000	234.63
ONMOBILE	OnMobile Global Limited	ANSHUL SAIGAL	BUY	532000	75.15
SRM	SRM Contractors Limited	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	200000	215.25
CLOUD	Varanium Cloud Limited	JANAK NAVINBHAI PANCHAL	SELL	241000	49

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