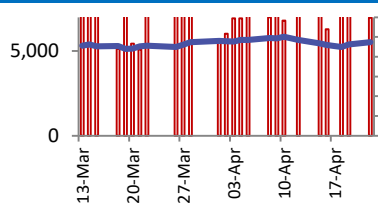
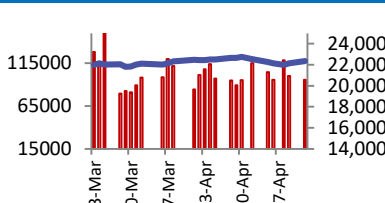


BSE



80,C	Open	73667
75,C	High	73768
65,C	Low	73227
55,C	Close	73649
	Change	560
	Volume (Lacs)	8573
	Turnover (Rs.inCr)	6980

NSE



	Open	22337
	High	22376
	Low	22198
	Close	22336
	Change	189
	Volume(Lacs)	48301
	Turnover(Rs.in Cr)	95525

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	38240	37986	254	0.7%
Dow Futures	38481	38468	13	0.0%
Nasdaq	15451	15282	169	1.1%
FTSE	8024	7896	128	1.6%
Nikkei	37535	37439	96	0.3%
Hang Seng	16728	16512	216	1.3%
Gift Nifty	22391	22458	(67)	-0.3%
Straits Singapore	3264	3225	39	1.2%
South Korea	2633	2629	4	0.2%
Taiwan	19590	19411	179	0.9%
Shanghai	3026	3045	(19)	-0.6%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9752	9830	(78.0)	-0.8%
Alumin (\$/MT)	2626	2671	(45.0)	-1.7%
Zinc (\$/MT)	2800	2832	(32.0)	-1.1%
Brent Crude (\$/bbl)	87.0	87.0	0.0	0.0%
Gold (\$/Ounce)	2310	2327	(17.0)	-0.7%
Silver (\$/Ounce)	27.0	27.0	0.0	0.0%
Light Crude (\$/bbl)	82.0	82.0	0.0	0.0%
N G (\$/mmbtu)	2.0	2.0	0.0	0.0%
Sugar (\$/MT)	570.0	564.0	6.0	1.1%
Rubber (Rs./kg)	180.0	179.0	1.0	0.6%
Baltic Dry Index	1882	1919	(37.0)	-1.9%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.37	83.47	-0.12%
Rs./ Euro	88.80	88.97	-0.19%
Rs./Chinese Yuan	11.51	11.51	0.00%
Yen /\$ rate	154.73	154.85	-0.08%
\$ US/Euro	1.07	1.07	0.00%

Dollar Index	Current	Previous	Var(%)
Dollar Index	105.26	105.28	-0.02%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22270	47700
Support 2	22200	47440
Resistance	22400	48140

Securities in Ban For Trade	
SAIL	PEL
IDEA	HINDCOPPER
ZEEL	BIOCON

Market Review

US: U.S. stocks rebounded on Monday, with Corporate America kicking off the busiest week for first-quarter earnings that will be key in shaping the outlook for equities. The S&P 500 Index and Nasdaq 100 rose by 0.27% and 0.22%.

Asia: Asian shares extended gains on Tuesday, taking cues from Wall Street as focus shifts to earnings results from U.S. tech giants in the week.

India: India's benchmark stock indices ended higher for the second day on Monday, led by gains in shares of ICI Bank, Larsen & Toubro, and Infosys, as a relief rally enveloped domestic and global markets alike. **Market is expected to open on a positive note and likely to witness range bound move during the day.**

Global Economy: Japanese Finance Minister Shunichi Suzuki said on Tuesday that last week's trilateral meeting with his U.S. and South Korean counterparts has laid the groundwork for Tokyo to take appropriate action to deal with excessive yen moves. The fresh warnings against excessive currency moves came after the dollar rose to 154.85 yen, its strongest levels against the Japanese currency since 1990, keeping markets on heightened alert for any signs of intervention from Tokyo to prop up the yen.

New Zealand's central bank said on Tuesday it does not agree with the assessment of the country's competition watchdog that its prudential capital settings need to be reviewed. In March, a draft Commerce Commission report found that there was limited competition in New Zealand's personal banking sector and one of its recommendations was that the central bank review its capital setting requirements. RBNZ Deputy Governor Christian Hawkesby said the current bank capital framework is the result of a careful and extensive review process that occurred recently and is still being phased in.

Commodities: Gold prices edged up on Tuesday but hovered near a one-week low hit in the previous session, as worries over a wider Middle East conflict subsided, boosting investors' risk appetite and lowering bullion's safe-haven demand.

Oil prices steadied in Asian trading on Tuesday, after falling in the previous session, as investors continued to assess the risk from geopolitical concerns in the Middle East.

Currency: A firm U.S. dollar had the yen locked near a fresh 34-year low on Tuesday, keeping investors on heightened intervention watch as they looked ahead to key U.S. inflation report and the Bank of Japan's rate decision this week.

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	70395	6205	76296	6696	(491)	341451	33009	351390	33337	(9939)	(328)
Index Option	20539939	1753993	20832347	1768935	(14942)	4448349	409159	3965416	358205	482933	50954
Stock Future	1386741	116391	1345408	112975	3416	3282557	270599	3232274	263183	50283	7416
Stock Option	629510	55639	619387	54878	761	402479	34204	413792	34867	(11313)	(663)
Total	22626585	1932228	22873438	1943484	(11256)	8474836	746971	7962872	689592	511964	57379

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
12-Apr-24	15335	23274	(7940)
15-Apr-24	10735	13969	(3233)
16-Apr-24	10994	14258	(3265)
18-Apr-24	18545	22708	(4163)
19-Apr-24	16861	16089	773
Month to date-Apr	214380	218861	(4481)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
15-Apr-24	10444	13712	(3268)
16-Apr-24	10209	14677	(4468)
18-Apr-24	18231	22492	(4260)
19-Apr-24	16286	16156	129
22-Apr-24	13190	16105	(2915)
Month to date-Apr	184802	209947	(25145)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
15-Apr-24	13579	8816	4763
16-Apr-24	13537	11497	2040
18-Apr-24	14274	11988	2286
19-Apr-24	9397	9449	(53)
22-Apr-24	11856	8313	3543
Month to date-Apr	173138	148326	24812
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
12-Apr-24	2353	4119	(1766)
15-Apr-24	2119	2103	16
16-Apr-24	1304	4668	(3363)
18-Apr-24	1742	4324	(2582)
19-Apr-24	1516	2336	(819)
Month to date-Apr	27464	34457	(6993)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2599	64%	1838	69%
Decline	1310	32%	739	28%
Unchanged	148	4%	97	4%

Market Turnover	22-Apr	19-Apr	Var (%)
BSE Cash	6980	8124	-14%
NSE Cash	95525	100281	-5%
NSE Futures	309242	216512	43%
NSE Options	22013403	13681364	61%
Total (Rs.Cr)	22425151	14006281	60%

Volatility Index	22-Apr	19-Apr
Volatility Index	12.70	13.46

Index PE - TTM	22-Apr	Yr. High	Yr. Low
Sensex	24.7	26.0	22.2
Nifty	22.8	28.8	20.3

Corporate News

ONGC plans June drilling for India's first geothermal project in Ladakh

ONGC is gearing up for a fresh geothermal drilling campaign in Ladakh, aiming to tap into emission-free energy sources. The project could provide electricity, heating, and irrigation in Ladakh's harsh terrains. Planned drilling in June aims to complete two 1,000-meter wells by September. (ET)

CMS Info Systems to enter gold logistics, loan collection services

CMS Info Systems plans to expand into gold logistics and retail loan repayments collection, having already piloted these ventures. The company sees potential in India's formalizing bullion sector and the evolving lending ecosystem. It has collaborated with major clients and institutions for its pilot programs. (ET)

Paytm completes merchant migration to YES Bank

One97 Communications has completed the migration of merchant handles on its platform to YES Bank after the National Payments Corporation of India's (NPCI's) direction last month. the NPCI notified that YES Bank would act as a merchant acquiring bank for existing and new UPI merchants for OCL. Similarly, four banks - Axis Bank, HDFC Bank, State Bank of India, and YES Bank now act as PSP (Payment System Provider) banks to OCL. (BS)

Economy

Uttar Pradesh govt scales up industrial land bank to 25,000 acres

With Uttar Pradesh aiming to become a trillion-dollar economy by 2027, the state government has built a robust land bank of 25,000 acres for prompt allotment to industries. Recently, 1,470 acres were allocated by UPSIDA in Lalitpur district for the development of a bulk drug park. The project is poised to position the state as a leading hub for pharmaceuticals, generic medicines, and medical devices in South Asia. (BS)

International

Cognizant, Microsoft announce partnership to expand adoption of GenAI

As part of the partnership, Cognizant purchased 25,000 Microsoft 365 Copilot seats for Cognizant associates, along with 500 Sales Copilot seats and 500 Services Copilot seats to enhance productivity, streamline workflows, and transform customer experiences. In addition, Cognizant will work to deploy Microsoft 365 Copilot to a million users within their global 2,000 clients and across 11 industries. (Reuters)

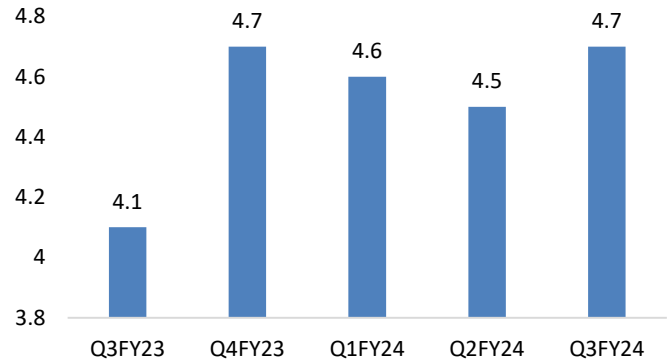
Top 5 Nifty Gainers	22-Apr	19-Apr	Var(%)
BPCL	603	586	3.0%
TATACONSUM	1171	1138	2.9%
EICHERMOT	4467	4344	2.8%
LT	3613	3518	2.7%
SHRIRAMFIN	2425	2367	2.5%
Top 5 Nifty Losers	22-Apr	19-Apr	Var(%)
NTPC	343	351	-2.2%
HDFCBANK	1512	1531	-1.2%
JSWSTEEL	855	865	-1.2%
INDUSINDBK	1478	1482	-0.3%
TATASTEEL	162	162	-0.2%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	73649	0.8%	-0.8%	1.1%	23.5%
MIDCAP	40375	0.9%	-1.3%	4.1%	62.5%
SMLCAP	46008	1.3%	0.3%	7.6%	63.0%
AUTO	49538	0.9%	-0.4%	2.7%	67.0%
BANKEX	54222	0.9%	-1.2%	2.1%	13.5%
Capital Goods	62043	1.7%	-0.3%	5.6%	76.4%
FMCG	19294	1.0%	-0.2%	0.0%	14.6%
Health Care	34784	1.0%	-1.4%	0.9%	52.3%
IT	34341	0.6%	-4.0%	-4.1%	28.7%
METAL	30320	0.3%	-0.1%	8.9%	52.8%
Oil & Gas	28499	0.9%	0.9%	4.9%	58.9%
Power	6930	0.4%	-1.4%	6.0%	91.4%
Realty	7339	0.7%	-2.1%	6.3%	116.5%

NSE USD Futures	22-Apr	19-Apr	Var (%)
April Expiry (Rs./\$)	83.38	83.53	-0.2%
May Expiry (Rs./\$)	83.11	83.49	-0.4%
Total Turnover (Rs. Crore)	3650	6672	-45%

Sectors	TTM PE
Auto	31.74
Auto Ancillary	45.4
Banking	16.04
Engineering	40.48
Cement	78.93
Diamonds & Jewellery	46.05
Housing Finance	20.07
Infrastructure & Const	30.18
Metals-Aluminium	39.82
Metal - Steel	17.69
Oil Expl.	20.83
Pharma	12.95
Power – Gen. Supp.	45.81
Information Tech.	21.95
Sugar	14.93
Telecom Serv. Prov.	84.42
Tyres	25.85

JK Cement quarterly sales volume in MT
(Source: Company Data)



10 year G-Sec Yield	Current	Previous	Change
US	4.61%	4.61%	0 bps
Japan	0.89%	0.89%	0 bps
India	7.19%	7.23%	(4) bps
UK	4.21%	4.23%	(2) bps
Libor 3 Mths	5.59%	5.59%	0 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation - WPI	0.53%	0.20%	33 bps
Inflation - CPI	4.85%	5.09%	(24) 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)	-465	-466	0.3

IIP Growth %	Jan-24	Jan-23	Apr-Feb
IIP	5.7	6.0	6.2
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 22/04/24

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
543319	AAPLUSTRAD	HARDIKHASUBHAIKANANI	B	328000	12.58
543319	AAPLUSTRAD	KETAN KIRTIKUMAR VAKHARIA	B	48000	12.98
543319	AAPLUSTRAD	RINKY	S	48000	12.98
543319	AAPLUSTRAD	SANJAYBHAIBHAGWANBHAIJALODRA	B	472000	12.56
543319	AAPLUSTRAD	SHUBHAM ASHOKBHAI PATEL	S	792000	12.61
543319	AAPLUSTRAD	SHUBHAM ASHOKBHAI PATEL	B	304000	12.99
543319	AAPLUSTRAD	SONIA VASHISHTH	S	88000	12.92
540718	AKM	MAHADEV MANUBHAI MAKVANA	S	72000	115.5
540718	AKM	NNM SECURITIES PVT LTD	B	72000	115.5
512149	AVANCE	INTERTICK DEVELOPERS PRIVATE LIMITED	S	29228876	0.98
543209	BILLWIN	SUMIT BANSAL	S	18000	74.2
543209	BILLWIN	SUSHILKUMAR	B	12000	86.62
532113	BRJLEAS	KIRITKUMAR AMRUTLAL GOPANI	S	47900	7.21
523696	FORTISMLR	CAMELLIA TRADEX PRIVATE LIMITED	B	100000	107.94
523696	FORTISMLR	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	246122	107.94
540190	FRANKLININD	HJS SECURITIES PRIVATE LIMITED	S	418359	5.56
514386	GUJCOTEX	KARUPPAIYA VINOTHKUMAR	S	76387	4.8
514386	GUJCOTEX	VIVEK KANDA	B	80000	4.89
544163	GVL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	87000	95
544163	GVL	SAHASTRAA ADVISORS PRIVATE LIMITED	B	87000	95
544163	GVL	SPARK FINANCE	B	24000	99.75
544163	GVL	SPRING VENTURES	B	75000	99.75
544163	GVL	SWETABEN HARDIK SHAH	B	150000	99.75
540134	IISL	FAISALSHAIKH	B	126159	6.07
540134	IISL	LAXMAN HARKISHAN NARANG	B	50000	5.6
540134	IISL	SUREKHA CHAUDHARY	S	130806	6.04
540134	IISL	SWETABEN HARDIK SHAH	S	50000	5.6
540134	IISL	SWETABEN HARDIK SHAH	B	3	5.6
536709	INDRENEW	NITIN SHARMA	B	280000	17.99
536709	INDRENEW	PROFIN COMMODITIES PRIVATE LIMITED	S	362053	17.99
505100	INRADIO	NEW INDIA ASSURANCE CO. LTD	S	10000	7.54
505100	INRADIO	RUCHIRA GOYAL	B	7000	7.54
523550	KRYPTONQ	ANJANA BANGAD	B	100000	49.05
543613	MAFIA	FAZAL ANWARHUSSEIN MEMON	B	32000	18.53
543613	MAFIA	PRAVINBHAI MANCHHUBHAI PATEL	S	24000	18.58
543613	MAFIA	PRAVINBHAI MANCHHUBHAI PATEL	B	8000	17.54
543613	MAFIA	YOGESH PRAJAPATI	S	60000	17.73
542206	NIVAKA	MALANI WEALTH ADVISORS PRIVATE LIMITED	B	607000	4.08
538537	OMANSH	DHRUVJAI RAJBALSARA	B	138375	0.52
538537	OMANSH	JANKIPRIYAMTHAKKAR	B	125000	0.52
538537	OMANSH	JASWANTSINGH	B	100000	0.52
538537	OMANSH	MANJU DEVI MEENA	S	124166	0.52
538537	OMANSH	SARITAHEMBROM	S	400772	0.52
531512	ORIENTTR	GURPREET SINGH	S	63657	7.73
517417	PATELSAI	AMODINI SALES PRIVATE LIMITED	B	31000	493.52
530095	PRADHIN	AJAY CHAUDHARI	S	50000	45.9
539435	RFSL	ANILKUMAR	B	30001	50.22
530025	SAMYAKINT	ALPANA KHANDELWAL	B	37501	26.14
530025	SAMYAKINT	SUNIL KHANDELWAL	B	36902	26.11
530025	SAMYAKINT	SUNITA GARG	S	75000	26.12
540259	SHANGAR	DEEPAL PRAVINBHAI SHAH HUF	B	114754	4.97
540259	SHANGAR	GUJARAT TOOLROOM LIMITED	S	228259	4.97
540072	SHIVAEXPO	BASAVARAJ CHANNAPPA MAHASHETTI	S	240000	10.43

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
DEEM	Deem Roll Tech Limited	EPITOME TRADING AND INVESTMENTS	SELL	58000	109.7
ENSER	Enser Communications Ltd	GUPTA NIDHI	BUY	50000	68.54
ENSER	Enser Communications Ltd	PANKAJ KUMAR GUPTA	SELL	52000	68.02
ENSER	Enser Communications Ltd	PANKAJ KUMAR HUF	SELL	50000	68.4
INDRAMEDCO	Indraprastha Med Corp	QUANT MUTUAL FUND - QUANT SMALL CAP FUND	BUY	550000	249.59
JALAN	Jalan Transolu. India Ltd	INDUS WORLD TRADE LIMITED	SELL	108000	4.02
KMSUGAR	K.M.Sugar Mills Limited	VLS FINANCE LTD	SELL	800000	45.03
KTL	Kalahridhaan Trendz Ltd	MITESH MAKVANA	BUY	99000	52
KTL	Kalahridhaan Trendz Ltd	PANKAJKUMAR JAYANTILAL PATEL	SELL	99000	52
RAMASTEEL	Rama Steel Tubes Limited	BANSAL SHASHI	SELL	8000000	12.7
SUMEETINDS	Sumeet Ind Limited	PROFIN COMMODITIES PRIVATE LIMITED	SELL	698621	1.94
TRUST	Trust Fintech Limited	ANKUSH KEDIA	BUY	243600	254.82
TRUST	Trust Fintech Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	129600	244.27
VINSYS	Vinsys IT Services Ind Lt	BOFA SECURITIES EUROPE SA	BUY	82500	363.84

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