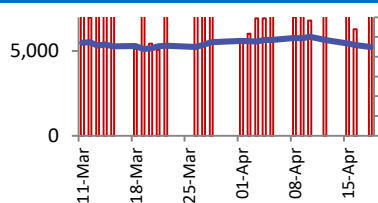
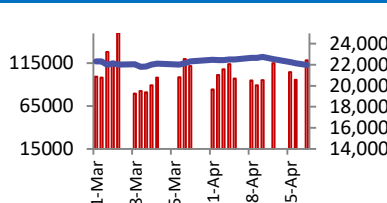


**BSE**



80,C	Open	73183
75,C	High	73473
65,C	Low	72366
55,C	Close	72489
50,C	Change	-455
	Volume (Lacs)	7428
	Turnover (Rs.inCr)	7395

**NSE**



	Open	22212
	High	22327
	Low	21962
	Close	21996
	Change	-152
	Volume(Lacs)	40755
	Turnover(Rs.in Cr)	118491

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	37775	37753	22	0.1%
Dow Futures	37557	38007	(450)	-1.2%
Nasdaq	15602	15683	(81)	-0.5%
FTSE	7877	7848	29	0.4%
Nikkei	36739	38080	(1341)	-3.5%
Hang Seng	16154	16386	(232)	-1.4%
Gift Nifty	21715	22025	(310)	-1.4%
Straits Singapore	3161	3188	(27)	-0.8%
South Korea	2558	2635	(77)	-2.9%
Taiwan	19562	20301	(739)	-3.6%
Shanghai	3073	3074	(1)	0.0%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9760	9735	25.0	0.3%
Alumin (\$/MT)	2640	2615	25.0	1.0%
Zinc (\$/MT)	2831	2813	18.0	0.6%
Brent Crude (\$/bbl)	91.0	87.0	4.0	4.6%
Gold (\$/Ounce)	2401	2379	22.0	0.9%
Silver (\$/Ounce)	29.0	28.0	1.0	3.6%
Light Crude (\$/bbl)	86.0	83.0	3.0	3.6%
N G (\$/mmbtu)	2.0	2.0	0.0	0.0%
Sugar (\$/MT)	569.0	559.0	10.0	1.8%
Rubber (Rs./kg)	180.0	182.0	(2.0)	-1.1%
Baltic Dry Index	1901	1844	57.0	3.1%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.54	83.54	0.00%
Rs./ Euro	89.15	88.81	0.38%
Rs./Chinese Yuan	11.54	11.54	0.00%
Yen /\$ rate	153.77	154.64	-0.56%
\$ US/Euro	1.06	1.06	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	21700	46840
Support 2	21620	46470
Resistance	22140	47740

Securities in Ban For Trade	
BALRAMCHIN	BANDHANBNK
NATIONALUM	GNFC
HINDCOPPER	SAIL
METROPOLIS	IDEA
EXIDEIND	ZEEL
PEL	

**Market Review**

**US:** US stocks vacillated on Thursday, swinging from red to green and back as investors contended with the push-pull of a strong economy and restrictive Federal Reserve policy.

**Asia:** Asian shares and bond yields sank on Friday while safe-haven currencies, gold and crude oil jumped after reports of a sharp escalation in Middle East hostilities.

**India:** India's benchmark stock indices erased intraday gains to extend their losing streak to the fourth session on Thursday as banks dragged. **Market is expected to open gap down and likely to witness selling pressure during the day.**

**Global Economy:** Japan's core inflation slowed in March and an index gauging broader price trends fell below 3% for the first time in over a year, data showed on Friday, as analysts say yen weakness could complicate the central bank's policy deliberations. The nationwide core consumer price index (CPI), which excludes fresh food items but includes energy items, rose 2.6% in March from a year earlier, matching median market forecasts. It decelerated from a 2.8% rise in February due to a slowdown in food price increases but stayed comfortably above the central bank's 2% target. While consumer inflation is expected to slow, the BOJ's focus is on whether service prices accompanied by higher wage growth will pick up from here.

Federal Reserve policymakers have coalesced around the idea of keeping borrowing costs where they are until perhaps well into the year, given slow and bumpy progress on inflation, and a still-strong U.S. economy. On Thursday New York Fed President John Williams became the latest U.S. rate-setter to embrace the "no rush" on rate cuts view articulated in February by Fed Governor Christopher Waller and since echoed by many of his colleagues. Strong growth in jobs, a third-month-in-a-row upside surprise on inflation in March, and robust retail spending among other recent economic indicators have convinced more central bankers that rate cuts ought to wait.

**Commodities** Gold prices rose on Friday, on track for their fifth weekly gain, with investors gravitating towards safe-haven assets as political uncertainty in the Middle East overshadowed pressures from the prospect of higher-for-longer U.S. interest rates.

Oil prices jumped on Friday in reaction to unconfirmed reports that explosions had occurred in Iran, sparking concerns that Middle East oil supply could be disrupted.

**Currency** The resurgent dollar headed towards a second straight week of gains on Friday as a hotter-than-expected U.S. economy has pushed back investors' and policymakers' expectations of the trajectory of 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	66736	6225	137831	13246	(7021)	306614	28442	288237	26553	18377	1889
Index Option	40377569	4162555	40104392	4132908	29647	3057188	276093	3132163	314294	(74975)	(38201)
Stock Future	476792	40681	532833	45278	(4597)	3246110	264388	3151705	258103	94405	6285
Stock Option	909315	80370	902088	79827	543	418461	35071	401616	33959	16845	1112
<b>Total</b>	<b>41830412</b>	<b>4289831</b>	<b>41677144</b>	<b>4271259</b>	<b>18572</b>	<b>7028373</b>	<b>603994</b>	<b>6973721</b>	<b>632909</b>	<b>54652</b>	<b>(28915)</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
8-Apr-24	31364	22837	8527
10-Apr-24	13830	10599	3230
12-Apr-24	15335	23274	(7940)
15-Apr-24	10735	13969	(3233)
16-Apr-24	10994	14258	(3265)
<b>Month to date-Apr</b>	<b>178974</b>	<b>180064</b>	<b>(1091)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
10-Apr-24	13345	10567	2778
12-Apr-24	15405	23432	(8027)
15-Apr-24	10444	13712	(3268)
16-Apr-24	10209	14677	(4468)
18-Apr-24	18231	22492	(4260)
<b>Month to date-Apr</b>	<b>155327</b>	<b>177686</b>	<b>(22359)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
10-Apr-24	12343	12179	163
12-Apr-24	17220	10879	6342
15-Apr-24	13579	8816	4763
16-Apr-24	13537	11497	2040
18-Apr-24	14274	11988	2286
<b>Month to date-Apr</b>	<b>151886</b>	<b>130564</b>	<b>21321</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
8-Apr-24	1325	769	556
10-Apr-24	3458	2082	1377
12-Apr-24	2353	4119	(1766)
15-Apr-24	2119	2103	16
16-Apr-24	1304	4668	(3363)
<b>Month to date-Apr</b>	<b>24206</b>	<b>27798</b>	<b>(3592)</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1761	45%	1168	44%
Decline	2047	52%	1400	53%
Unchanged	121	3%	90	3%

Market Turnover	18-Apr	16-Apr	Var (%)
BSE Cash	7395	6288	18%
NSE Cash	118491	95437	24%
NSE Futures	224730	146530	53%
NSE Options	53065033	52487120	1%
Total (Rs.Cr)	53415649	52735376	1%

Volatility Index	18-Apr	16-Apr
Volatility Index	13.04	12.62

Index PE - TTM	18-Apr	Yr. High	Yr. Low
Sensex	24.8	26.0	22.2
Nifty	22.5	28.8	20.3

Corporate News

**Infosys to acquire engineering R&D services provider in-tech for \$480 mn**

This strategic investment further strengthens Infosys' engineering R&D capabilities and will aid global clients to navigate their digital engineering journey. The acquisition is expected to be closed during H1FY25, subject to regulatory approvals. Germany-headquartered in-tech shapes digitisation in the automotive, rail transport and smart industry sectors. It develops solutions pertaining to e-mobility, connected and autonomous driving, electric vehicles, off-road vehicles and railroad. (ET)

**Ramkrishna Forgings to supply powertrain components to US' largest EV maker**

It was a "significant milestone" in its journey towards pioneering electric mobility solutions. This landmark approval signifies the company's position into the electric passenger vehicle segment with a strong emphasis on powertrain components. This approval not only signifies its debut in the US EV market but also unlocks a multitude of thrilling new prospects. (BS)

**Tata Communications dials up AI compute spends as Nvidia deal advances**

Tata Communications said that it is making significant investments in creating artificial intelligence compute capacity as it progresses on its deal with superchip maker Nvidia to build an AI supercomputer. The Tatas will partake in the Centre's AI Mission to offer AI services to startups and researchers. (ET)

Economy

**FPIs pull out of debt, selling pressure may continue until bond inclusion**

The debt market saw a reversal of fortunes in April after a year of consistent robust monthly inflows from foreign portfolio investors. Market participants anticipate that the selling pressure will persist, with the expectation that the bond market will regain its stability following the JPMorgan bond index inclusion in June. In April so far, foreign investors have pulled out a net of Rs 3,592 crore from the debt market due to the surge in US Treasury yields and escalating geopolitical tensions in West Asia. (BS)

**New BOT terms may revive pvt capex in highways: India Ratings and Research**

The National Highways Authority of India's recent attempt to revive the build-operate-transfer mode of building highways will augur well for the road sector and revive private capital expenditure in the industry. The highway authority, which has been trying to reduce its debt, has increased its own spending multifold to keep up the pace of infrastructure development without raising its borrowing levels, which stand close to Rs 3 tn. (BS)

International

**Apple removes WhatsApp, Threads from China app store**

Apple removed WhatsApp and Threads from its app store in China on Friday saying it was ordered to by the government. The iPhone maker said China's top internet regulator asked it to remove the apps because of national security concerns. (Reuters)

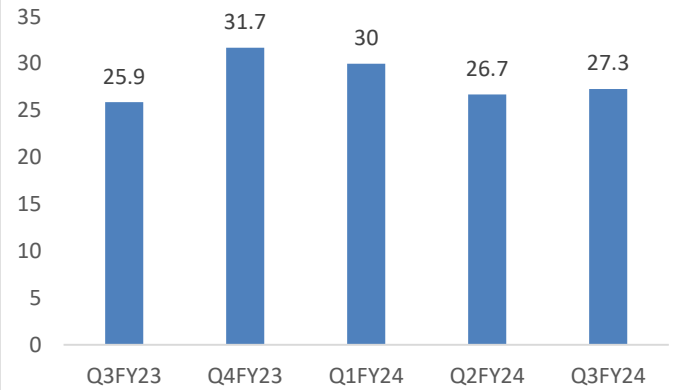
Top 5 Nifty Gainers	18-Apr	16-Apr	Var(%)
BHARTIARTL	1266	1216	4.1%
POWERGRID	280	274	2.1%
BAJAJ-AUTO	9021	8919	1.1%
LTIM	4697	4663	0.7%
HINDALCO	613	609	0.6%
Top 5 Nifty Losers	18-Apr	16-Apr	Var(%)
APOLLOHOSP	6074	6335	-4.1%
TITAN	3525	3646	-3.3%
NESTLEIND	2463	2546	-3.3%
COALINDIA	439	453	-3.2%
ONGC	274	283	-3.2%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	72489	-0.6%	-2.9%	0.7%	21.7%
MIDCAP	40160	-0.4%	-1.4%	6.4%	61.0%
SMLCAP	45450	0.1%	-1.1%	9.4%	60.7%
AUTO	48942	-0.7%	-2.2%	5.0%	63.9%
BANKEX	53178	-1.1%	-3.4%	1.0%	11.2%
Capital Goods	61157	0.0%	-2.1%	8.5%	73.8%
FMCG	19023	-1.0%	-1.5%	0.7%	13.7%
Health Care	34576	-1.2%	-3.1%	2.6%	50.5%
IT	34333	-0.2%	-4.4%	-5.6%	29.3%
METAL	29988	-0.5%	-0.1%	10.5%	49.0%
Oil & Gas	28281	-1.0%	0.6%	7.0%	57.7%
Power	6929	-0.3%	-1.6%	10.7%	92.3%
Realty	7337	-0.7%	-2.4%	11.9%	110.8%

NSE USD Futures	18-Apr	16-Apr	Var (%)
April Expiry (Rs./\$)	83.53	83.65	-0.1%
May Expiry (Rs./\$)	83.54	83.61	-0.1%
Total Turnover (Rs. Crore)	9904	7238	37%

Sectors	TTM PE
Auto	32.5
Auto Ancillary	45.19
Banking	16.4
Engineering	39.78
Cement	80.22
Diamonds & Jewellery	46.09
Housing Finance	20.18
Infrastructure & Const	32.28
Metals-Aluminium	41.1
Metal - Steel	17.76
Oil Expl.	20.27
Pharma	12.64
Power – Gen. Supp.	46.51
Information Tech.	22.21
Sugar	15.01
Telecom Serv. Prov.	82.78
Tyres	26.44

**Ultratech Cement Ltd. Quarterly sales volume in mt**  
(Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
<b>US</b>	4.52%	4.63%	(11) bps
<b>Japan</b>	0.83%	0.87%	(4) bps
<b>India</b>	7.19%	7.19%	0 bps
<b>UK</b>	4.27%	4.26%	1 bps
<b>Libor 3 Mths</b>	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)	697	739	(42.7)

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 18/04/24**

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
526662	ARENTERP	PANSHUL RASTOGI	S	16500	55.7
537069	ARNOLD	MOHIT VINODKUMAR AGRAWAL	S	250000	43.86
537069	ARNOLD	RESONANCE OPPORTUNITIES FUND	B	250000	43.86
512149	AVANCE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	14048040	1
512149	AVANCE	TOPGAIN FINANCE PRIVATE LIMITED	S	11702742	1.05
512149	AVANCE	TOPGAIN FINANCE PRIVATE LIMITED	B	8783041	1.04
539662	BFLAFL	PRAGATI DREAMLAND DEVELOPERS PRIVATE LIMITED	S	53810	20.74
539662	BFLAFL	SANJAYKUMAR JAYANTIBHAI VALAND	B	100000	20.69
543439	BRANDBUCKT	DEV GANPAT PAWAR	S	184000	10.49
543439	BRANDBUCKT	NIKUNJ KAUSHIK SHAH	S	186000	10.87
543439	BRANDBUCKT	NIKUNJ KAUSHIK SHAH	B	28000	11.11
538817	CAPPIPES	NK SECURITIES RESEARCH PVT. LTD.	S	792843	22.14
538817	CAPPIPES	NK SECURITIES RESEARCH PVT. LTD.	B	787787	22.08
538817	CAPPIPES	SAHASTRAA ADVISORS PRIVATE LIMITED	B	900000	22.82
544151	CHATHA	VINEY EQUITY MARKET LLP	B	118000	105.29
504340	CONFINT	A A DOSHI SHARE AND STOCK BROKERS LIMITED .	S	110315	7.73
504340	CONFINT	KAPILMAHESHKUMARBHAMBHA	S	150000	7.7
542155	DGL	RAJESH KUMAR PIROGIWAL AND SONS HUF	S	76000	2.6
543594	DPL	SHUBHAM ASHOKBHAI PATEL	S	282000	8.1
531259	ESHAMEDIA	ANANT PADMANABHAN	S	200000	6.65
531259	ESHAMEDIA	OPULUS BIZSERVE PRIVATE LIMITED	B	399751	6.65
531259	ESHAMEDIA	SHRIDHAR PARAMESHWARAN IYER	S	200000	6.65
523696	FORTISMLR	CAMELLIA TRADEX PRIVATE LIMITED	B	108000	89.21
544156	GCONNECT	MAKWANA DIXIT CHANDUBHAI	S	39000	42.22
544156	GCONNECT	PURE BROKING PRIVATE LIMITED	B	24000	42.22
542850	GOBLIN	SHRI KRUPA DECORATIVE VENEER PRIVATE LIMITED .	S	100000	54.65
542850	GOBLIN	SOMANI VENTURES AND INNOVATIONS LIMITED	B	108000	54.61
532015	GRAVITY	DINESH DHANJI DEDHIA	S	50500	3.94
513337	GUJTLRM	KAPADIA FINWEALTH LLP .	S	279870	38.9
543613	MAFIA	DEVENDRA VEER GUPTA	B	24000	17.11
531494	NAVKAR	RUKHMANI GARMENTS LLP	S	2951877	8.43
511535	NDASEC	ANILKUMAR	B	30925	56.06
543924	SONALIS	ANANT WEALTH CONSULTANTS PRIVATE LIMITED	B	24000	42.87
543924	SONALIS	DHARINI SUHAG SHAH	S	12000	42.87
543924	SONALIS	JIMITKUMAR DILIPKUMAR SANGHVI	S	60000	42.87
543924	SONALIS	JYOTI NIRAJ AGARWAL	B	10000	42.87
543924	SONALIS	KHATNANI VISHAL	S	38000	42.87
543924	SONALIS	MIT JIMIT SANGHVI	S	14000	42.87
543924	SONALIS	MOHAMMEDIBRAHIMMUSTAFA	B	34000	42.87
543924	SONALIS	NIRAJ RAMESHCHANDRA AGARWAL	B	20000	42.87
543924	SONALIS	RAMESH CHAND AGARWAL	B	10000	42.87
543924	SONALIS	RISHI KHANDELWAL	B	20000	42.87
543924	SONALIS	RITESH RAMESHCHAND AGARWAL	B	10000	42.87
543924	SONALIS	SANDESH KHANDELWAL	B	20000	42.87
543924	SONALIS	TEJAL JIMITKUMAR SANGHVI	S	16000	42.87
531652	THIRDFIN	VANDANA GUPTA	S	15000	114.01
544002	VIVAA	ASNANI STOCK BROKER PRIVATE LIMITED	S	20000	31.5
544002	VIVAA	SHARMILA .	B	20000	31.5
503675	WAGEND	VENDIGGE ENGINEERING PROJECTS PRIVATE LIMITED	B	300000	1.28
540550	YUG	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	50600	78.82

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AGUL	A G Universal Limited	SUHAS RAJU VASISHTHA	SELL	66000	58.3
ATALREAL	Atal Realtech Limited	YELLOWSTONE VENTURES LLP	SELL	651962	13.81
DCG	DCG Cables & Wires Ltd	NIKUNJ STOCK BROKERS LTD	SELL	106800	81.6
GMRP&UI	GMR Pow and Urban Infra	SARASWATI COMMERCIAL (INDIA) LTD	BUY	4000000	54.96
GMRP&UI	GMR Pow and Urban Infra	VARANIUM INDIA OPPORTUNITY LTD	SELL	3450487	54.97
JYOTI-RE	Jyoti Structures Ltd	GDN INVESTMENTS PRIVATE LIMITED	BUY	1433424	8.83
KMSUGAR	K.M.Sugar Mills Limited	VLS FINANCE LTD	SELL	500040	36.05
KCK	Kck Industries Limited	CHANDRA BHAN KATARIA	SELL	40000	82.32
MAXPOSURE	Maxposure Limited	EMINENCE GLOBAL FUND PCC- EUBILIA CAPITAL PARTNERS FUND I	SELL	152000	86.48
MEDICO	Medico Remedies Limited	ESCORP ASSET MANAGEMENT LIMITED	SELL	500000	47.5
MEDICO	Medico Remedies Limited	MADHUKAR SHETH	BUY	511000	47.52
ONELIFECAP	Onelife Cap Advisors Ltd	ANBUPAUL	SELL	152000	19.05
ONELIFECAP	Onelife Cap Advisors Ltd	MAYANK AGRAWAL	SELL	175100	20.95
ONELIFECAP	Onelife Cap Advisors Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	200000	19.05
PRUDMOULI	PrudentialSugar-Roll Sett	PILOT CONSULTANTS PVT LTD	SELL	300000	26.75
SABAR	Sabar Flex India Limited	DEVSHREEBEN PRADIPKUMAR PANCHAL	BUY	90000	19.5
SABAR	Sabar Flex India Limited	THAKOR NAYANA CHANDUBHAI	SELL	160000	19.5
TPHQ	Teamo Productions HQ Ltd	VRINDAA ADVANCED MATERIALS LIMITED	SELL	10000000	1.4
TGL	Teerth Gopicon Limited	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	67200	137.8

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