

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	42410	41249	1161	2.8%
Dow Futures	42404	42493	(89)	-0.2%
Nasdaq	18708	17929	779	4.3%
FTSE	8605	8555	50	0.6%
Nikkei	38297	37644	653	1.7%
Hang Seng	23214	23549	(335)	-1.4%
Gift Nifty	24933	25075	(142)	-0.6%
Straits Singapore	3893	3876	17	0.4%
South Korea	2614	2607	7	0.3%
Taiwan	21398	21130	268	1.3%
Shanghai	3374	3369	5	0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9521	9446	75	0.8%
Alumin (\$/MT)	2480	2418	63	2.6%
Zinc (\$/MT)	2680	2654	27	1.0%
Brent Crude (\$/bbl)	65	65	(0)	-0.3%
Gold (\$/Ounce)	3230	3236	(6)	-0.2%
Silver (\$/Ounce)	33	33	0	0.5%
Light Crude (\$/bbl)	62	62	(0)	-0.3%
N G (\$/mmbtu)	4	4	0	1.3%
Sugar (\$/MT)	495	500	(5)	-1.0%
Rubber (Rs./kg)	195	195	0	0.0%
Baltic Dry Index	1304	1299	5	0.4%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	85.38	85.72	-0.39%
Rs./ Euro	96.02	96.74	-0.74%
Rs./Chinese Yuan	11.87	11.80	0.64%
Yen / \$ rate	147.96	148.46	-0.34%
\$ US/Euro	1.11	1.11	0.14%

Dollar Index	Current	Previous	Var(%)
Dollar Index	101.67	101.79	-0.11%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24840	55440
Support 2	24770	55200
Resistance	25000	55840

Securities in Ban For Trade	
CDSL	MANAPPURAM

Market Review

US: US stocks rally after the US and China agreed to a 90-day tariff cool down.

Asia: Asian stocks joined the global rally and the U.S. dollar held on to most of its gains on Tuesday as investors heaved a sigh of relief after a temporary halt in the trade war between the U.S. and China eased worries of a global recession.

India: Indian equity benchmark indices, rallied strongly in trade on India-Pakistan ceasefire and US-China trade deal progress. **Market is expected to open on a gap down note and likely to witness range bound move during the day.**

Global economy: The U.S. govt posted a \$258 bn budget surplus for April, up 23%, or about \$49 bn, from a year earlier, reflecting strong tax receipts in the final month of the tax season and record collections of import duties, the Treasury Deptt said. Treasury reported that customs duties in April totalled \$16 bn, about a \$9 bn increase from the year-earlier period and far eclipsing the previous record of \$9.6 bn two years earlier. The jump occurred during a month in which President Trump boosted tariffs on Chinese goods to as much as 145% while slapping at least 10% levies on imports of goods from other countries.

Japan's service-sector sentiment worsened in April on concern over the impact of higher U.S. tariffs, a govt survey showed, a sign uncertainty over trade talks with Washington was beginning to take a toll on the fragile economy. In the first survey since President Trump's April 2 announcement of "reciprocal tariffs", the govt downgraded its assessment to say the economy's recovery was weakening.

Commodities: Oil prices eased on Tuesday from a two-week high reached during the previous session after the U.S. and China agreed to temporarily slash tariffs, sparking optimism that a trade war between the world's two biggest economies would come to an end.

Gold steadied after a sharp selloff as a major de-escalation in US-China trade tensions hurt demand for havens.

Currency: The dollar held strong gains on Tuesday as investors cheered a tariff deal between the US and China to tap the brakes on a trade war between the two countries that had fed fears of a global recession.

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	39136	6764	31563	5552	1212	160449	28261	161792	27236	(1343)	1025
Index Option	7090858	1292976	7067803	1285205	7771	2897307	527488	2482593	434289	414714	93199
Stock Future	486540	31189	378109	24115	7074	5997282	383115	5948649	364769	48633	18346
Stock Option	1181713	78737	1198129	79660	(923)	1367738	86303	1318308	80155	49430	6148
Total	8798247	1409666	8675604	1394532	15134	10422776	1025167	9911342	906449	511434	118718

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
2-May-25		18050	15244	2807
5-May-25		10469	8673	1796
6-May-25		13482	9470	4011
7-May-25		16404	13452	2952
8-May-25		22515	20088	2427
Month to date- May		80920	66927	13993
FII (Prov.) (Rs Cr)		Buy	Sell	Net
5-May-25		9366	8868	498
6-May-25		13471	9677	3795
7-May-25		16372	13786	2586
8-May-25		22366	20358	2008
9-May-25		11483	15281	(3799)
Month to date-May		103963	94859	9104
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
5-May-25		13918	11129	2789
6-May-25		10963	12361	(1398)
7-May-25		13169	10791	2378
8-May-25		12683	13279	(596)
9-May-25		15547	8269	7278
Month to date-May		94870	79680	15190
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
2-May-25		1618	1317	301
5-May-25		1706	1095	611
6-May-25		3311	4535	(1224)
7-May-25		2657	4078	(1421)
8-May-25		4468	2949	1519
Month to date- May		13760	13974	(214)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	3541	83%	2591	87%
Decline	582	14%	319	11%
Unchanged	131	3%	60	2%

Market Turnover	12-May	09-May	Var (%)
BSE Cash	6859	6336	8%
NSE Cash	106751	94551	13%
NSE Futures	172120	134858	28%
NSE Options	14318048	9776787	46%
Total (Rs.Cr)	14603778	10012533	46%

Volatility Index	12-May	09-May
Volatility Index	18.39	21.63

Index PE - TTM	12-May	Yr. High	Yr. Low
Sensex	22.1	25.2	20.3
Nifty	22.4	24.4	19.6

Corporate News
Paytm Block Deal: China's Antfin likely to offload up to 4% stake worth ₹2,066 crore

Antfin Netherlands Holding B.V. is set to sell 2.6 crore shares or 4% stake in the company on Tuesday. The transaction will occur through a block deal, with a floor price established at Rs 809.75 per share, representing a 6.5% discount from the current market price. (NDTV)

General Atlantic to sell 6.9% stake in KFin Tech for Rs 1,209.5 crore via block deals

A block deal by a promoter General Atlantic Singapore Fund Pvt. is scheduled for Tuesday. The floor price for the deal is Rs 1,025 per share, which is an 8.3% discount compared to the current market price. The offer size involves up to 1.18 crore shares, representing a 6.9% stake in the company, with a total deal value of up to Rs 1,210 crore. (NDTV)

Shree Cement has received a grant order for limestone mines in Rajasthan, with mineral resources of 211 million tonnes

Shree Cement has received a grant order for a limestone mine in Jaisalmer, Rajasthan, with mineral resources of 211 million tonnes. This grant order covers approximately 912 hectares of land. The acquisition is expected to bolster the company's raw material base, potentially increasing long-term production capacity and cost efficiency. (NDTV)

Economy
India-EU FTA talks turn to carbon tax, QCO issues

India and the EU are discussing ways to manage non-tariff barriers such as the bloc's Carbon Border Adjustment Mechanism and Deforestation Regulation and New Delhi's Quality Control Orders in the ongoing round of their bilateral free trade pact talks. (ET)

India exports 4.24 lakh tonnes sugar till April of this year

India has exported 4.24 lakh tonnes of sugar up to April in the current marketing year, with Somalia being the top importer at 92,758 tonnes. Out of the permitted 10 lakh tonnes for export, the All India Sugar Trade Association anticipates reaching 8 lakh tonnes. (ET)

International
US approves \$1.4 bln weapons sale to UAE before Trump visit

The U.S. State Department authorized the sale of about \$1.4 billion worth of military aircraft and equipment to the UAE, coming just ahead of President Donald Trump's visit to the region this week. The principal contractors for the sale will be Boeing and Honeywell. (Invst)

Top 5 Nifty Gainers	12-May	09-May	Var(%)
INFY	1627	1508	7.9%
ADANIENT	2425	2251	7.7%
SHRIRAMFIN	646	601	7.4%
HCLTECH	1670	1569	6.4%
TRENT	5441	5113	6.4%
Top 5 Nifty Losers	12-May	09-May	Var(%)
INDUSINDBK	789	818	-3.6%
SUNPHARMA	1686	1745	-3.4%

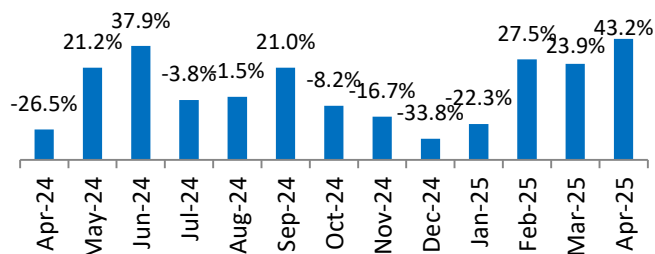
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	82430	3.7%	2.0%	9.7%	13.3%
MIDCAP	43732	3.8%	0.9%	8.6%	6.2%
SMLCAP	48694	4.2%	1.6%	6.3%	7.5%
AUTO	52411	3.4%	3.0%	13.8%	2.3%
BANKEX	63133	3.3%	1.6%	8.1%	15.8%
Capital Goods	65274	3.9%	3.3%	11.5%	5.6%
FMCG	20734	2.7%	0.4%	2.8%	4.3%
Health Care	41599	0.9%	-1.8%	3.0%	18.5%
IT	37527	6.8%	6.2%	16.2%	11.1%
METAL	30120	5.2%	4.1%	8.5%	-2.6%
Oil & Gas	26842	2.9%	-1.3%	9.4%	-2.9%
Power	6676	4.8%	0.0%	2.5%	-6.8%
Realty	6769	5.9%	-1.5%	10.6%	-8.7%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	69151	0.6%	0.0%	2.2%	-11.6%
Fresh Exposure	4137	-19.5%	-11.0%	-8.2%	0.8%
Exposure liquidated	4784	1.8%	-1.1%	28.6%	13.5%
Closing Net scripwise outstanding	68504	-0.9%	-0.7%	0.1%	-12.3%

NSE USD Futures	12-May	09-May	Var (%)
Apr Expiry (Rs./\$)	N.A.	87.00	0.0%
May Expiry (Rs./\$)	N.A.	87.56	0.0%
Total Turnover (Rs. Crore)	N.A.	3911	0%

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

SML Isuzu Monthly Volume Growth (YoY) (Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.45%	4.47%	(2) bps
Japan	1.48%	1.46%	2 bps
India	6.38%	6.40%	(2) bps
UK	4.64%	4.57%	8 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	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)	1480	1564	(83.4)

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	18.65	16249496	17.49	8642437	6.63%	1	1592.36	1626.90	-2.1%
Wipro	2.99	7479271	2.82	3426762	6.03%	1	255.29	257.28	-0.8%
Dr.Reddy's	13.93	2353889	13.40	2671979	3.96%	1	1189.36	1195.60	-0.5%
ICICI Bank	33.58	12566931	32.31	5439331	3.93%	2	1433.55	1448.50	-1.0%
HDFC Bank	72.52	2490525	70.48	2323242	2.89%	3	2063.95	1957.20	5.5%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	41.90	40.35	1.6	3.8%
RIL	67.30	64.50	2.8	4.3%
SBI	94.10	91.20	2.9	3.2%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.40%	2.80%
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	13 May
Indian Inflation Data WPI	14 May
Indian Monetary Policy	06 Jun
India's Industrial Production (IIP)	28 May
US Inflation Data	13 May
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
Adani Ports and Special Economic Zone Ltd.	13-05-25	Rs.7.00 per share(350%)Final Dividend
Advanced Enzyme Technologies Ltd.	13-05-25	Interim Dividend
Ambuja Cements Ltd.	13-05-25	Rs.2.00 per share(100%)Dividend
Aptus Value Housing Finance India Ltd.	13-05-25	Rs.2.50 per share(125%)Interim Dividend
Archean Chemical Industries Ltd.	14-05-25	Rs.3.00 per share(150%)Final Dividend
Atishay Ltd.	14-05-25	Rs.1.00 per share(10%)Final Dividend
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 12/05/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
542012	A1L	ZETA GLOBAL FUNDS (OEIC) PCC LIMITED - ZETA SERIES B FUND PC	B	70000	500
543377	ADISHAKTI	RUCHIRA GOYAL	B	40000	15.57
543209	BILLWIN	HARDIK MAHESH PANDIT	B	21000	33.41
532467	HAZOR	KANTILAL CHHAGANLAL SECURITIES PVT LTD.	S	191693	39.4
532467	HAZOR	KANTILAL CHHAGANLAL SECURITIES PVT LTD.	B	1053347	39.44
532467	HAZOR	SHREE VIHAR HOUSING & DEVELOPERS PRIVATE LIMITED	S	1359612	39.29
539449	IGCIL	SUNCITY WIZARD LLP	B	200000	5.09
521242	KANDAGIRI	H M TEXTILES PRIVATE LIMITED	S	45000	38.62
521242	KANDAGIRI	SANJANA GOVIND SHOREWALA	B	24868	38.51
544400	MANOJJEWEL	SHRENI SHARES LTD	B	62000	51.42
513721	MFSINTRCRP	PATEL PREET DILIPBHAI	B	29380	17.04
530805	OIVL	GILANI INFRA PRIVATE LIMITED	S	205000	1.62
531512	ORIENTTR	RANDEEP SINGH	B	120000	21.24
531512	ORIENTTR	YAKSHIT FINANCE LIMITED	S	79890	21.51
512591	PULSRIN	AMITKUMAR DINESHBHAI PANCHAL	S	500000	7.6
512591	PULSRIN	COMFORT ADVERTISING PVT LTD	S	1127	7.6
512591	PULSRIN	COMFORT ADVERTISING PVT LTD	B	617469	7.6
511116	QUADRANT	ISHAAN TRADEFIN LLP	S	6124453	0.32
511116	QUADRANT	ISHAAN TRADEFIN LLP	B	479389	0.34
511116	QUADRANT	JIGNESHBHUPENDRARUPARELIYA	S	3965552	0.33
538452	QUASAR	SATISH VAGHARI	S	20403777	0.9
538452	QUASAR	THAKOR HANSABEN	S	19830523	0.91
530253	RAJTUBE	KALISHANKAR INDUSTRIES PRIVATE LIMITED	S	355036	32.25
534708	SHANTIGURU	NEETA JAIN	S	90000	8.4
539584	SIPTL	ALKABEN PRADIPKUMAR SHAH	S	3303125	0.49
542146	SKIFL	CHHAYA GAURANG SHAH	S	200000	52
542146	SKIFL	PASHUPATI CAPITAL SERVICE PVT LTD	B	192500	52.02
519242	SRDAPRT	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRIVATE LIMITED	S	10000	130.95
519242	SRDAPRT	VIVEK KUMAR BHAIKA	B	9530	130.95
544399	SRIGEE	ISHAAN TRADEFIN LLP	B	558000	193.36
544399	SRIGEE	NEO APEX VENTURE LLP	B	122400	188.1
511700	STANCAP	SHARE INDIA SECURITIES LIMITED	S	10292156	0.41
511700	STANCAP	SHARE INDIA SECURITIES LIMITED	B	10292156	0.41
539798	UMIYA	SUBHADRA RAMESHCHANDRA SHAH	S	146846	12.24

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AGSTRA	AGS Transact Tech Ltd	NEW BERRY ADVISORS LTD	SELL	4290000	3.96
GATECH-RE1	GACM Techno Ltd	GAYI ADI HOLDINGS PRIVATE LIMITED	SELL	5034397	0.06
GATECH-RE1	GACM Techno Ltd	SHANTU BHAKTA	BUY	3625300	0.06
GATECH-RE1	GACM Techno Ltd	SUBHASH CHANDRA	SELL	3580599	0.06
GATDVR-RE	GACM Technologies Ltd	GURSEWAK SINGH	BUY	1000000	0.06
GATDVR-RE	GACM Technologies Ltd	SKSE SECURITIES LTD	SELL	580610	0.06
GATDVR-RE	GACM Technologies Ltd	SUMITRA	SELL	534736	0.06
GATDVR-RE	GACM Technologies Ltd	SWASTIK GARG	SELL	500000	0.06
GENSOL	Gensol Engineering Ltd	NOVA GLOBAL OPPORTUNITIES FUND PCC - TOUCHSTONE	SELL	300000	53.95
GODHA	Godha Cabcon Insulat Ltd	ALKABEN PRADIPKUMAR SHAH	SELL	8131003	0.65
GPECO	GP Eco Solutions India L	CCV EMERGING OPPORTUNITIES FUND-I	SELL	70800	377.94
BIRDYS	Grill Splendour Ser Ltd	MANISH JUGRAJ JAIN HUF	SELL	162000	111.2
BIRDYS	Grill Splendour Ser Ltd	RIKHAV SECURITIES LIMITED	BUY	98400	111.24
BIRDYS	Grill Splendour Ser Ltd	SANGEETA SHETALBHAI SHAH	BUY	50400	111.86
JALAN	Jalan Transolu. India Ltd	YASHIKA CAPITAL FINVEST PRIVATE LIMITED	BUY	117000	9.98
MAHICKRA	Mahickra Chemical Limited	MAYURKUMAR BABUBHAI PATEL	SELL	85500	113.47
MAHICKRA	Mahickra Chemical Limited	SAGAR PRAVINCHANDRA KHAKHARA	BUY	201000	113
MOTILALOFS	Motilal Oswal Financial S	CITIGROUP GLOBAL MARKETS MAURITIUS PVT LTD	BUY	203343	679.5
MOTILALOFS	Motilal Oswal Financial S	MORGAN STANLEY ASIA SINGAPORE PTE	SELL	203343	679.5
NORTHARC	Northern Arc Capital Ltd	360 ONE SPECIAL OPPORTUNITIES FUND - SERIES 2	SELL	3547587	194.64
NORTHARC	Northern Arc Capital Ltd	MORGAN STANLEY ASIA SINGAPORE PTE	BUY	880000	193
SHANTI	Shanti Overseas (Ind) Ltd	DARSHANA HIMANSHU BATHIA	BUY	75000	14.91
SUNCLAY	Sundaram Clay ton Limited	SRINIVASAN TRUST	SELL	620265	1990.09
SUNCLAY	Sundaram Clay ton Limited	TATA MUTUAL FUND	BUY	621000	1990
TANLA	Tanla Platforms Limited	AMERICAN FUNDS INSURANCE SERIES GLOBAL SMALL CAPITALIZATION FUND	SELL	231010	470.15
TANLA	Tanla Platforms Limited	DASARI UDAY KUMAR REDDY	BUY	1862256	470.15
TANLA	Tanla Platforms Limited	DASARI UDAY KUMAR REDDY	BUY	1862256	470.15
TANLA	Tanla Platforms Limited	SMALLCAP WORLD FUND INC	SELL	1631246	470.15
TANLA	Tanla Platforms Limited	SMALLCAP WORLD FUND INC	SELL	1631246	470.15
VAISHALI	Vaishali Pharma Limited	NISHANT PITTI	SELL	741798	12.03

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