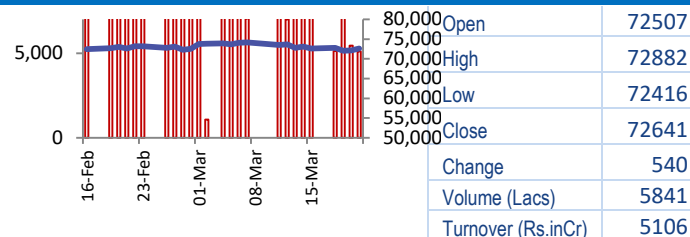
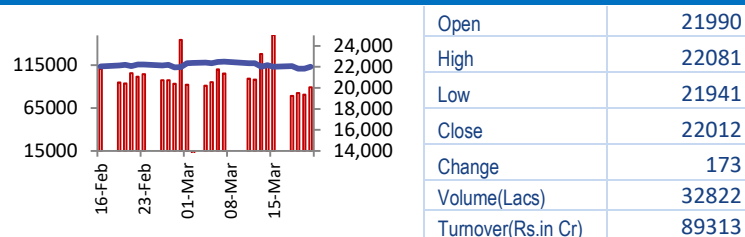


BSE



NSE



World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	39781	39512	269	0.7%
Dow Futures	40220	40206	14	0.0%
Nasdaq	16402	16369	33	0.2%
FTSE	7883	7737	146	1.9%
Nikkei	40878	40816	62	0.2%
Hang Seng	16499	16863	(364)	-2.2%
Gift Nifty	22059	22042	17	0.1%
Straits Singapore	3213	3220	(7)	-0.2%
South Korea	2748	2755	(7)	-0.3%
Taiwan	20146	20199	(53)	-0.3%
Shanghai	3043	3077	(34)	-1.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8951	8928	23.0	0.3%
Alumin (\$/MT)	2302	2273	29.0	1.3%
Zinc (\$/MT)	2525	2509	16.0	0.6%
Brent Crude (\$/bbl)	85.0	86.0	(1.0)	-1.2%
Gold (\$/Ounce)	2173	2181	(8.0)	-0.4%
Silver (\$/Ounce)	25.0	25.0	0.0	0.0%
Light Crude (\$/bbl)	81.0	81.0	0.0	0.0%
N G (\$/mmbtu)	2.0	2.0	0.0	0.0%
Sugar (\$/MT)	640.0	629.0	11.0	1.7%
Rubber (Rs./kg)	184.0	186.0	(2.0)	-1.1%
Baltic Dry Index	2240	2284	(44.0)	-1.9%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.15	83.17	-0.02%
Rs./ Euro	90.76	90.15	0.68%
Rs./Chinese Yuan	11.53	11.57	-0.35%
Yen /\$ rate	151.59	151.62	-0.02%
\$ US/Euro	1.08	1.09	-0.92%

Dollar Index	Current	Previous	Var(%)
Dollar Index	104.12	104.01	0.11%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	21940	46570
Support 2	21870	46340
Resistance	22100	47100

Securities in Ban For Trade	
BALRAMCHIN	BIOCON
SAIL	INDUSTOWER
PEL	ZEEL
TATACHEM	

Market Review

US: Wall Street's three major stock indexes on Thursday registered record closing highs for the second day in a row after the Federal Reserve reassured investors about the prospects for rate cuts this year while chip stocks rallied after Micron Technology's upbeat forecast.

Asia: markets in Asia-Pacific region were trading on a mixed note as investors assessed Federal Reserve's policy outcome

India: India's benchmark equity indices gained for the second day, with financial services stocks contributing the most to advances following the U.S. Federal Reserve's decision to keep interest rates unchanged. **Market is expected to open on flattish note and likely to witness sideways move during the day.**

Global Economy: Japan consumer price index (CPI) inflation rose as expected in February, rising well above the Bank of Japan's annual target rate and giving more credence to the central bank's recent policy shift. Core CPI inflation which excludes volatile fresh food prices, grew an annualized 2.8% in Feb, official data showed on Friday. The reading was in line with expectations and picked up sharply from the 2% seen in the prior month- where it had fallen to the BOJ's 2% annual target for the first time since early-2022.

The U.S. current account deficit narrowed in the fourth quarter to the lowest level in nearly three years amid an increase in secondary income. The Commerce Department's Bureau of Economic Analysis said that the current account deficit, which measures the flow of goods, services and investments into and out of the country, contracted \$1.6 billion, or 0.8%, to \$194.8 billion last quarter. That was the lowest level since the first quarter of 2021

Commodities: Gold prices edged higher on Friday and were set for a fourth weekly rise in five after the U.S. Federal Reserve maintained its interest rate cut projections for the year, boosting investor sentiment.

Oil prices sank in early Asian trading on Friday on the possibility of a nearing Gaza ceasefire, which could loosen global supply, at the same time a stronger U.S. dollar and faltering gasoline dampened demand sentiment.

Currency: US dollar was set for a second week of broad gains on Friday, with even a rate hike in Japan unable to dislodge it, as investors figure US rates are high and not falling yet.

FII Derivative Transactions (Rs. Cr)

Contracts	Purchase		Sell		Net Value	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value		Contract	Value	Contract	Value	Contract	Value
Index Future	65311	5473	59436	5030	443	263261	23597	253820	22452	9441	1145
Index Option	30959404	3094184	31310231	3128618	(34434)	3123561	269940	3242490	311856	(118929)	(41916)
Stock Future	404707	33017	364118	29734	3283	3168397	252625	3158358	248119	10039	4506
Stock Option	757608	65914	750642	65291	623	376031	31962	384419	32118	(8388)	(156)
Total	32187030	3198588	32484427	3228673	(30085)	6931250	578124	7039087	614545	(107837)	(36421)

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
14-Mar-24	21037	21151	(114)
15-Mar-24	50330	49557	773
18-Mar-24	11282	12448	(1167)
19-Mar-24	17224	15873	1351
20-Mar-24	11258	13500	(2243)
Month to date-Mar	277280	242057	35223
FII (Prov.) (Rs Cr)	Buy	Sell	Net
15-Mar-24	49505	48656	849
18-Mar-24	10144	12195	(2051)
19-Mar-24	16839	15418	1421
20-Mar-24	10600	13200	(2599)
21-Mar-24	14246	16073	(1827)
Month to date- Mar	280851	276596	4255
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
15-Mar-24	15255	15937	(682)
18-Mar-24	10135	7874	2261
19-Mar-24	16887	9437	7449
20-Mar-24	11532	8865	2668
21-Mar-24	12950	9742	3209
Month to date-Mar	180577	136943	43633
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
14-Mar-24	986	1927	(940)
15-Mar-24	3101	2145	956
18-Mar-24	1463	2244	(781)
19-Mar-24	1232	1667	(435)
20-Mar-24	4386	2227	2159
Month to date-Mar	31822	19406	12416

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2749	70%	2048	78%
Decline	1076	27%	533	20%
Unchanged	101	3%	57	2%

Market Turnover	21-Mar	20-Mar	Var (%)
BSE Cash	5106	5449	-6%
NSE Cash	89313	80846	10%
NSE Futures	172579	151621	14%
NSE Options	46939196	68590678	-32%
Total (Rs.Cr)	47206195	68828593	-31%

Volatility Index	21-Mar	20-Mar
Volatility Index	12.51	13.47

Index PE - TTM	21-Mar	Yr. High	Yr. Low
Sensex	24.8	26.0	21.9
Nifty	22.7	28.8	20.0

Corporate News

M&M, Adani Total Energies join hands to set up EV charging infrastructure

M&M has joined hands with Adani Group's Adani Total Energies E-Mobility Limited (ATEL), to set up electric vehicle charging infrastructure across the country. The partnership will also entail rolling out e-mobility solutions to provide seamless access to the charging network for the customers covering discovery, availability, navigation, and transactions.

TCS signs 7-year deal with Denmark-based IT firm Ramboll

TCS said that it has signed a multimillion-dollar strategic partnership to carry out the end-to-end IT transformation of Ramboll, a global architecture, engineering, and consultancy company headquartered in Denmark. Over the next seven years, TCS will help and streamline Ramboll's IT operating model to drive business growth and optimise the IT cost base.

Naveen Jindal takes charge as president of the Indian Steel Association

Naveen Jindal has been unanimously elected as the president of ISA by the apex committee. Jindal said that for India to realise its development goals, steel along with its upstream and downstream manufacturing value chains have to grow in tandem. He also said that decarbonisation was a huge challenge which is a key initiative for saving the planet.

Income Tax dept imposes Rs 103.63 cr fine on Tata Chemicals

IT Department has imposed a penalty of Rs 103.63 crore on Tata Chemicals for violation related to disallowance of interest. (ET)

Economy

India's Russian oil imports edged up in February from January

Last month, Indian refiners imported 1.51 million barrels per day (bpd) of Russian oil, a rise of about 2.8% from January, the data showed. That was about 12.2% lower than the corresponding month a year ago. Russian oil made up about 32% of India's overall oil imports in February, compared with 28% the previous month, the data showed. (ET)

International

Apple shares down after US DOJ sues the company on iPhone monopoly claims

Apple stock closed 4% lower Thursday after it was confirmed the Department of Justice has officially sued in an antitrust case for monopolization of smartphone markets. (Investing.com)

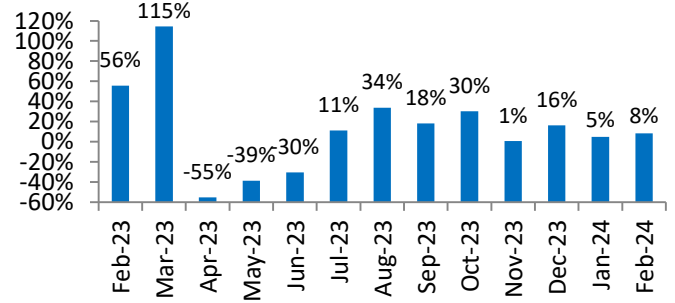
Top 5 Nifty Gainers	21-Mar	20-Mar	Var(%)
BPCL	588	567	3.7%
NTPC	325	314	3.6%
POWERGRID	274	265	3.4%
TATASTEEL	150	146	3.1%
COALINDIA	432	420	3.0%
Top 5 Nifty Losers	21-Mar	20-Mar	Var(%)
BHARTIARTL	1221	1232	-0.9%
HDFCLIFE	622	626	-0.7%
ONGC	263	264	-0.3%
MARUTI	11908	11941	-0.3%
ICICIBANK	1082	1085	-0.2%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	72641	0.7%	-0.6%	-0.7%	24.8%
MIDCAP	38652	2.4%	0.5%	-3.0%	60.8%
SMLCAP	42322	2.0%	1.0%	-7.6%	55.7%
AUTO	47514	1.4%	0.8%	0.2%	69.1%
BANKEKX	52953	0.7%	-0.3%	-0.7%	16.8%
Capital Goods	58046	2.8%	0.9%	3.5%	68.2%
FMCG	19128	0.8%	-1.3%	-2.5%	18.0%
Health Care	34089	0.9%	-0.3%	-4.6%	57.6%
IT	36554	0.8%	-4.1%	-5.5%	30.3%
METAL	27638	2.7%	3.5%	0.6%	44.8%
Oil & Gas	27102	1.4%	-1.5%	-5.2%	53.7%
Power	6510	3.1%	1.4%	-1.5%	78.3%
Realty	6783	3.0%	3.3%	-5.6%	115.4%

NSE USD Futures	21-Mar	20-Mar	Var (%)
March Expiry (Rs./\$)	83.13	83.18	-0.1%
April Expiry (Rs./\$)	83.13	83.18	-0.1%
Total Turnover (Rs. Crore)	43293	31321	38%

Sectors	TTM PE
Auto	30.06
Auto Ancillary	42.71
Banking	15.67
Engineering	38.58
Cement	78.76
Diamonds & Jewellery	38.82
Housing Finance	19.74
Infrastructure & Const	34.49
Metals-Aluminium	40.79
Metal - Steel	15.81
Oil Expl.	16.22
Pharma	12.2
Power – Gen. Supp.	45.8
Information Tech.	19.72
Sugar	13.87
Telecom Serv. Prov.	80.73
Tyres	26.62

Atul Auto Monthly Volume Growth (YoY) (Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.26%	4.27%	(1) bps
Japan	0.75%	0.74%	1 bps
India	7.05%	7.09%	(4) bps
UK	4.00%	4.02%	(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	0.20%	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)	-1173	-618	(554.5)

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 21/03/24

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
531525	ACESOFT	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	30589	101.02
534733	AERPACE	TOPGAIN FINANCE PRIVATE LIMITED	B	1105000	10.73
543804	AMANAYA	PRAVINBHAI MANCHHUBHAI PATEL	S	18000	27.19
543804	AMANAYA	PRAVINBHAI MANCHHUBHAI PATEL	B	24000	23.78
543804	AMANAYA	SITA RAM SHARMA	S	24000	23.38
543804	AMANAYA	SOMANI VENTURES AND INNOVATIONS LIMITED	B	90000	26.28
537069	ARNOLD	RAJIV MEHTA	B	157000	28.12
543497	BCCL	INDIACREDIT RISK MANAGEMENT LLP	S	80000	51.05
543497	BCCL	MALANI WEALTH ADVISORS PRIVATE LIMITED	B	80000	51.05
540023	COLORCHIPS	ZILLOW REAL ESTATE LLP	S	512325	3.74
512379	CRESSAN	AVANTIKA COMMOSALES LLP	B	2290232	15.26
512441	ENBETRD	DAMYANTI JIVANDAS GOKALGANDHI	B	100000	13.97
508954	FINKURVE	DEVKUMARI MANEKCHAND KOTHARI	B	752000	49.5
508954	FINKURVE	NARENDRA SHIVJI SHAH	S	752000	49.5
531911	GALAGEX	JAYESHBHAI KISHORBHAI KALAVADIA	S	16261	45.02
542918	GIANLIFE	RAJESH MANOHAR MAKODE	B	59000	23.27
531913	GOPAIST	SINDHI VIVEK	S	29061	7
532467	HAZOR	TOPGAIN FINANCE PRIVATE LIMITED	B	101000	308
539175	INDRAIN	ASTHA DEVI JAIN	S	102153	12.03
540515	KANUNGO	JABALI COMMERCIAL COMPANY PRIVATE LIMITED .	B	27546	4.51
544139	KOURA	ASHISH KUMAR	S	20000	60.86
544139	KOURA	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	62000	60.92
543262	MRP	ANMOL COMTRADE	S	69000	57.57
531832	NAGTECH	GUTTUKONDA VARA LAKSHMI	B	225622	9.3
531832	NAGTECH	JIVESH JAIN	S	100000	9.45
531832	NAGTECH	REGENT COMMODITIES BROKING PRIVATE LIMITED	S	128936	9.1
543522	NVENTURES	CHHOTELAL CHAUDHARI	S	66000	51.4
538742	PANABYTE	NIKIT D RAMBHIA	S	56000	24.5
538742	PANABYTE	RAIBEN GOVINDBHAI PATEL	B	22245	24.5
539515	QUINT	RB DIVERSIFIED PRIVATE LIMITED	B	255394	110.39
543285	RCAN	NIRAJ RAJNIKANT SHAH	B	100000	110.06
543285	RCAN	PAULOMI KETAN DOSHI	S	50000	110.1
544143	ROYAL	HARYANA REFRACTORIES PRIVATE LIMITED	S	34000	119.36
530025	SAMYAKINT	RAJESH KUMAR GARG	S	50000	23.3
530025	SAMYAKINT	SUNIT JAIN	B	41660	23.31
538875	SELLWIN	VISHAL CHINUBHAI SUTHAR HUF	B	80056	14.93
505515	SHYMINV	PARESH DHIRAJLAL SHAH	B	49673	11.93
538923	SOFCOM	KULDIP MAHAVIRCHAND JAIN	S	20973	40.24
538923	SOFCOM	SAMKIT BHAWAR JAIN	S	29171	39.01
538923	SOFCOM	VISAGAR FINANCIAL SERVICES LIMITED	B	30000	39.08
511447	SYLPH	SAROJ GUPTA	S	1307000	3.12
539428	TEJNAKSH	PIYUSH SECURITIES PVT LTD	S	150000	25.1
539428	TEJNAKSH	PIYUSH TRADES & CREDITS PRIVATE LIMITED	B	150000	25.1
539310	THINKINK	AVR INVESTMENT ADVISORS LLP	S	500000	36
537582	UNISHIRE	VINAY KIRTI MEHTA	S	200000	2.28
539097	URSUGAR	ACHINTYA SECURITIES PVT. LTD.	B	650000	15
539097	URSUGAR	MEDANTA REAL ESTATE PRIVATE LIMITED	B	325000	15

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ADROITPP	Adroit Infotech Limited	AGRAWAL AGRIM	BUY	175000	4.05
ADROITPP	Adroit Infotech Limited	KAILASHBEN ASHOKKUMAR PATEL	BUY	288000	4.05
ADROITPP	Adroit Infotech Limited	MANSI SHARE AND STOCK ADVISORS PVT LTD	SELL	248390	4.05
ADROITPP	Adroit Infotech Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	502785	4.05
ANZEN	Anzen Ind Ene Yld Plu Tru	EDELWEISS BROKING LIMITED	BUY	1000000	100
ANZEN	Anzen Ind Ene Yld Plu Tru	EDELWEISS INFRASTRUCTURE YIELD PLUS	SELL	1000000	100
ASTRON	Astron Paper Bord Mil Ltd	DWARKESH FINANCE LIMITED	SELL	497500	20.84
ATALREAL	Atal Realtech Limited	KAUSHIK MAHESH WAGHELA	SELL	574153	16
BOHRAIND	Bohra Industries Limited	ANAND SONI	SELL	127743	18.05
CELLECOR	Cellecor Gadgets Limited	AMIT KUMAR SINGLA	BUY	138000	199.07
CMMIPL	CMM Infracorps Limited	SAMTA MUNDRA	SELL	87000	1.8
CREATIVE	Creative New tech Limited	CHETAN RASIKLAL SHAH	SELL	89157	699
DELAPLEX	Delaplex Limited	BIREN P GANDHI	SELL	98400	222
DELAPLEX	Delaplex Limited	SETU SECURITIES PVT LTD	BUY	98400	222
EFORCE	Electro Force (India) Ltd	AISHVARAYA GUPTA	SELL	132000	92.76
GSTL	Globesecure Techno Ltd	AJAYKUMAR NATAVARLAL SANGANI	SELL	54000	45.37
JSWHL	JSW Holdings Limited	VIKASA INDIA EIF I FUND	BUY	59210	6253.26
KRYSTAL	Krystal Integrated Ser L	BARCLAYS MERCHANT BANK (SINGAPORE) LIMITED	SELL	123787	758.16
KRYSTAL	Krystal Integrated Ser L	CHIRAG NARENDRA MODH	BUY	120001	721.98
KRYSTAL	Krystal Integrated Ser L	GIRIRAJ RATAN DAMANI	BUY	75000	762
KRYSTAL	Krystal Integrated Ser L	KHANAK BUDHIRAJA	BUY	100000	757.5
KRYSTAL	Krystal Integrated Ser L	NOMURA SINGAPORE LIMITED	SELL	500000	736.74
KRYSTAL	Krystal Integrated Ser L	SHAH TEJ JITENDRABHAI	BUY	100000	785
KRYSTAL	Krystal Integrated Ser L	SOCIETE GENERALE	BUY	100000	775.09
LAXMICOT	Laxmi Cotspin Limited	DINESH KANTILAL RATHI	BUY	90000	28.05
LAXMICOT	Laxmi Cotspin Limited	SAFFORD MERCANTILE PVTLTD	SELL	90000	27.45
MVKAGRO	M.V.K. Agro Food Prod Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	88800	52.39
MVKAGRO	M.V.K. Agro Food Prod Ltd	NIKUNJ STOCK BROKERS LTD	SELL	178800	57.85
MAKS	Maks Energy Sol India Ltd	INDIACREDIT RISK MANAGEMENT LLP	SELL	51000	64.05
MAKS	Maks Energy Sol India Ltd	MALANI WEALTH ADVISORS PRIVATE LIMITED	BUY	51000	64.05
MDL	Marvel Decor Limited	GINNI FINANCE PVT. LTD.	BUY	88000	93.77
MEDICO	Medico Remedies Limited	AUS ENTERPRISES	SELL	800000	59.48
MEDICO	Medico Remedies Limited	RAVI GOYAL (HUF)	BUY	800000	59.5
MONOPHARMA	Mono Pharmacare Limited	DEVANG CHANDRAKANTBHAI SHAH	SELL	100000	49.28
MONOPHARMA	Mono Pharmacare Limited	TIRUPATI FINCORP LIMITED	BUY	136000	49.2
JAIPURKURT	Nandani Creation Limited	GAURISHANKAR JHALANI	BUY	65000	55.63
JAIPURKURT	Nandani Creation Limited	UPHAR HOMFIN PRIVATE LIMITED	SELL	65000	55.63
OSIAHYPER	Osia Hyper Retail Ltd	DHIRENDRA GAUTAMKUMAR CHOPRA	SELL	4000000	30.65
OSIAHYPER	Osia Hyper Retail Ltd	MINERVA VENTURES FUND	BUY	3500000	30.65
RISHABH	Rishabh Instruments Ltd	ASHIKA GLOBAL SECURITIES PRIVATE LIMITED	SELL	216000	428.85
RISHABH	Rishabh Instruments Ltd	YADUKA FINANCIAL SERVICES LIMITED	BUY	220500	428.9
SHRENIK	Shrenik Limited	SHRENIK SUDHIR VIMAWALA	SELL	6300000	1
SIGNORIA	Signoria Creation Limited	VM PORTFOLIO PRIVATE LIMITED	BUY	30000	138.17
SKIPPERPP	Skipper Limited	VENTEX TRADE PRIVATE LIMITED	BUY	54000	148.27
SPENCERS	Spencer's Retail Limited	SACHIN KASERA HUF	BUY	500000	91.45
SPENCERS	Spencer's Retail Limited	SVAN INVESTMENT ADVISORS	SELL	500000	91.45
UNIVASTU	Univastu India Limited	VEENA RAJESH SHAH	SELL	130000	140

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