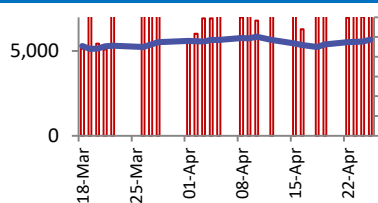
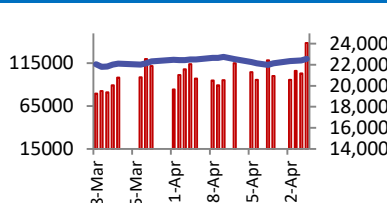


BSE



80,C,Open	73572
75,C,High	74571
65,C,Low	73556
55,C,Close	74339
Change	487
Volume (Lacs)	5033
Turnover (Rs.inCr)	9907

NSE



Open	22317
High	22626
Low	22305
Close	22570
Change	168
Volume(Lacs)	118127
Turnover(Rs.in Cr)	138701

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	38086	38461	(375)	-1.0%
Dow Futures	38315	38288	27	0.1%
Nasdaq	15612	15713	(101)	-0.6%
FTSE	8079	8040	39	0.5%
Nikkei	37780	37628	152	0.4%
Hang Seng	17545	17285	260	1.5%
Gift Nifty	22685	22641	44	0.2%
Straits Singapore	3285	3288	(3)	-0.1%
South Korea	2658	2629	29	1.1%
Taiwan	20179	19857	322	1.6%
Shanghai	3074	3053	21	0.7%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9950	9865	85.0	0.9%
Alumin (\$/MT)	2568	2564	4.0	0.2%
Zinc (\$/MT)	2883	2848	35.0	1.2%
Brent Crude (\$/bbl)	89.0	89.0	0.0	0.0%
Gold (\$/Ounce)	2334	2332	2.0	0.1%
Silver (\$/Ounce)	27.0	27.0	0.0	0.0%
Light Crude (\$/bbl)	84.0	84.0	0.0	0.0%
N G (\$/mmbtu)	2.0	2.0	0.0	0.0%
Sugar (\$/MT)	564.0	577.0	(13.0)	-2.3%
Rubber (Rs./kg)	178.5	179.5	(1.0)	-0.6%
Baltic Dry Index	1743	1774	(31.0)	-1.7%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.33	83.32	0.01%
Rs./ Euro	89.38	89.03	0.39%
Rs./Chinese Yuan	11.50	11.51	-0.09%
Yen /\$ rate	155.57	155.65	-0.05%
\$ 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	22500	48200
Support 2	22440	47740
Resistance	22640	48900

Securities in Ban For Trade
IDEA

Market Review

US: Wall Street on Thursday was rattled by data that showed exactly what stock traders did not want to hear: a significant slowdown in the world's largest economy and persistent inflation pressures.

Asia: Most markets in Asia-Pacific region were trading lower on Friday, tracking overnight losses in U.S. stocks, and as investors wait for the Bank of Japan's policy outcomes.

India: India's benchmark stock indices gained for the fifth straight day on Thursday, with the Nifty 50 closing above 22,500, led by nearly 4% gains in PSU banks. **Markets are expected to open on a flattish note and likely to remain sideways move during the day.**

Global Economy: China on Friday passed a law leaving its biggest trade partners in no doubt that it can hit back should they put tariffs on the exports of the world's No.2 economy as Washington and Brussels take aim at Beijing over excess industrial capacity. The Tariff Law, which was approved by China's top legislature after three rounds of deliberations going back to 2022, is the latest addition to Beijing's arsenal of trade defence instruments as it maintains an uneasy truce with the U.S. following a trade war that kicked off during the Trump administration.

The U.S. economy grew at its slowest pace in nearly two years in the first quarter amid a surge in imports and small build-up of unsold goods at businesses, signs of solid demand that together with an acceleration in inflation reinforced expectations the Federal Reserve would not cut interest rates before September. The cooler-than-expected growth reported by the Commerce Department in its snapshot of first-quarter gross domestic product on Thursday, which also reflected a downshift in government spending, exaggerated the moderation in economic activity. Domestic demand, a better growth measure, was strong as consumer spending moderated slightly while business investment picked up and the housing recovery gained steam.

Commodities: Gold prices edged lower on Friday and were set for a weekly decline as investor attention turned to key U.S. inflation data for cues on the Federal Reserve's interest rate trajectory.

Oil prices rose in early trade on Friday, as players took stock of the U.S. Treasury secretary's comments that the country's economy is likely in a stronger position than indicated by weak first-quarter data, coupled with supply concerns as conflict continues in the Middle East.

Currency: The yen was parked by a 34-year low on the dollar and decade lows on other crosses ahead of a Bank of Japan meeting where interest rates are expected to stay low, while the dollar dipped elsewhere on softer-than-expected U.S. growth data.

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	124944	12854	124884	13127	(273)	241188	22867	335913	33818	(94725)	(10951)
Index Option	35301462	3700438	34467779	3611066	89372	2557329	237465	3208506	329875	(651177)	(92410)
Stock Future	862098	72818	748188	62137	10681	3140383	262732	3204604	265581	(64221)	(2849)
Stock Option	98611	8656	112457	9800	(1144)	54142	4868	303024	25932	(248882)	(21064)
Total	36387115	3794766	35453308	3696130	98636	5993042	527932	7052047	655206	(1059005)	(127274)

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
18-Apr-24	18545	22708	(4163)
19-Apr-24	16861	16089	773
22-Apr-24	13322	15941	(2619)
23-Apr-24	15040	18499	(3458)
24-Apr-24	17198	12970	4227
Month to date-Apr	227702	234802	(7100)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
19-Apr-24	16286	16156	129
22-Apr-24	13190	16105	(2915)
23-Apr-24	14931	17976	(3045)
24-Apr-24	10243	12755	(2512)
25-Apr-24	19378	22202	(2823)
Month to date-Apr	229355	262879	(33524)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
19-Apr-24	9397	9449	(53)
22-Apr-24	11856	8313	3543
23-Apr-24	12338	9419	2919
24-Apr-24	12601	8791	3810
25-Apr-24	19088	12920	6168
Month to date-Apr	217165	179457	37708
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
18-Apr-24	1742	4324	(2582)
19-Apr-24	1516	2336	(819)
22-Apr-24	1721	777	945
23-Apr-24	753	2629	(1876)
24-Apr-24	849	4048	(3200)
Month to date-Apr	29939	37863	(7924)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2043	52%	1389	53%
Decline	1769	45%	1166	44%
Unchanged	122	3%	85	3%

Market Turnover	25-Apr	24-Apr	Var (%)
BSE Cash	9907	7021	41%
NSE Cash	138701	103161	34%
NSE Futures	414864	323057	28%
NSE Options	45913357	40391312	14%
Total (Rs.Cr)	46476829	40824551	14%

Volatility Index	25-Apr	24-Apr
Volatility Index	10.73	10.28

Index PE - TTM	25-Apr	Yr. High	Yr. Low
Sensex	24.9	26.0	22.2
Nifty	22.8	28.8	20.3

Corporate News

IndiGo takes the long haul leap, orders 30 Airbus A350 aircraft

IndiGo has placed an order for 30 Airbus A350-900 aircraft as part of its attempt to transform from a short-haul airline into a company that dominates long haul travel in the region. The airline also has purchase rights for another 70 planes, the delivery of which will begin from 2027. At list price, the order is worth \$12 bn, but airlines enjoy heavy discounts on bulk orders. (ET)

Sebi gives approval to CRISIL subsidiary to provide ESG ratings

The SEBI has approved CRISIL ESG Ratings & Analytics Limited as a Category 1 provider of environmental, social, and governance (ESG) ratings. The approval comes at a time when ESG disclosures are improving and financial markets recognize the need for independent ESG ratings. CRISIL had launched an ESG scoring business in FY21 which will now be transferred to CRISIL ESG Ratings. (ET)

Tata Steel to proceed with its £1.25 bn investment to build Furnace in Port Talbot

Tata Steel plans to continue its £1.25 bn investment in a state-of-the-art Electric Arc Furnace for steel production in Port Talbot, in collaboration with the UK government. The company will also shut down its existing two Blast Furnaces by the end of June and September. Tata Steel expects to order equipment for the electric arc furnace by Sep'24, and based on the current permit timelines, start construction on the project by Aug'25. (ET)

Economy

Engineering goods exports up 10.7% in March to \$11.28 bn: EEPCC

India's engineering goods including steel and machinery exports rose 10.7% YoY in March to \$11.28 bn, growing in double digits for the second straight month, despite ongoing supply issues caused by disruption to shipping through the Red Sea, a trade body said. Engineering goods, which account for one-fourth of merchandise exports, rose 2.1% in FY24, to \$109.3 bn FY23. (BS)

International

Toyota to invest \$1.4 bn in its Indiana plant, adding 340 new jobs

Toyota Motor would invest \$1.4 bn in its Princeton facility in Indiana to prepare for assembly of a three-row battery electric SUV. This brings up its total investment in Indiana to \$8 bn and adds up to 340 new jobs at the Japanese automaker. The latest investment comes after the company had said in February it would invest \$1.3 bn at its Kentucky facility for electrification efforts, including assembly of a new, three-row battery electric SUV for the U.S. market. (Reuters)

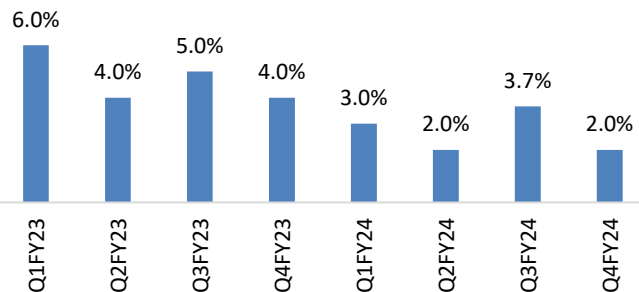
Top 5 Nifty Gainers	25-Apr	24-Apr	Var(%)
AXISBANK	1127	1063	6.0%
SBIN	813	773	5.1%
DRREDDY	6219	5951	4.5%
JSWSTEEL	906	883	2.6%
NESTLEIND	2563	2500	2.5%
Top 5 Nifty Losers	25-Apr	24-Apr	Var(%)
KOTAKBANK	1642	1843	-10.9%
LTIM	4635	4727	-1.9%
HINDUNILVR	2231	2260	-1.3%
TITAN	3571	3610	-1.1%
SBILIFE	1444	1460	-1.1%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	74339	0.7%	2.6%	2.6%	23.3%
MIDCAP	41247	0.7%	2.7%	5.6%	64.8%
SMLCAP	47113	0.5%	3.7%	10.3%	65.4%
AUTO	50256	0.9%	2.7%	4.2%	68.5%
BANKEK	54994	0.7%	3.4%	4.1%	13.2%
Capital Goods	63250	0.9%	3.4%	6.4%	76.4%
FMCG	19611	0.8%	3.1%	1.9%	14.9%
Health Care	35281	1.0%	2.0%	2.1%	55.4%
IT	34386	0.3%	0.2%	-3.5%	27.8%
METAL	31418	1.2%	4.8%	12.3%	57.9%
Oil & Gas	28849	0.9%	2.0%	5.3%	59.6%
Power	7072	0.9%	2.1%	8.0%	91.0%
Realty	7569	-0.1%	3.2%	8.0%	116.8%

NSE USD Futures	25-Apr	24-Apr	Var (%)
April Expiry (Rs./\$)	83.33	83.32	0.0%
May Expiry (Rs./\$)	83.11	83.11	0.0%
Total Turnover (Rs. Crore)	16317	14185	15%

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

Hindustan Unilever Ltd. Volume Growth YoY (Source: Company Data)



10 year G-Sec Yield	Current	Previous	Change
US	4.70%	4.70%	0 bps
Japan	0.93%	0.90%	3 bps
India	7.21%	7.19%	2 bps
UK	4.36%	4.33%	3 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)	-1278	-1202	(76.4)

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 25/04/24

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
543439	BRANDBUCKT	SANKET RAMESH FUKE	S	300000	8.15
543435	CLARA	ABHISHEK SINGHVI	B	30710	215.82
514386	GUJCOTEX	AJAY PRATAP SINGH	S	100003	5.64
514386	GUJCOTEX	AJAY PRATAP SINGH	B	100003	5.45
514386	GUJCOTEX	PRITHVI FINMART PRIVATE LIMITED	S	155233	5.18
514386	GUJCOTEX	PRITHVI FINMART PRIVATE LIMITED	B	126445	5.43
544163	GVL	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED .	B	36000	115.45
543600	HARSHA	AMERICAN FUNDS INSURANCE SERIES GLOBAL SMALL CAPITALIZATION FUND	S	970777	410.06
543600	HARSHA	PLUTUS WEALTH MANAGEMENT LLP	B	729669	410.01
540134	IISL	FAISALSHAIKH	B	74774	6.72
540134	IISL	PRAVIN TILOKCHAND JAIN	S	99000	6.72
540134	IISL	RAVI PARASMAL DOSHI	B	38500	6.72
540134	IISL	VIVEK PARASMAL DOSHI	B	34000	6.72
536709	INDRENEW	PARAMOUNT TRADING	S	85697	17.5
536709	INDRENEW	SUVAMDAS	B	150000	17.57
544139	KOURA	EPITOME TRADING AND INVESTMENTS	S	20000	61.41
544141	PESB	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	S	96000	135.23
544141	PESB	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	B	49600	131.34
539495	RAJKOTINV	NEETU BHALLA	B	8290	38.48
530025	SAMYAKINT	SUNIL KHANDLWAL	B	34150	30.07
530025	SAMYAKINT	SUNITA GARG	S	56128	30.03
530433	SHIVAAGRO	RAJESH MADHAVAN UNNI(HUF)	S	53807	44.49
540072	SHIVAEXPO	BASAVARAJ CHANNAPPA MAHASHETTI	B	80000	15.51
505515	SHYMINV	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	47988	9.7
544035	SPL	VARSHABEN JIGNESHKUMAR THOBHANI	B	100800	74.52
532975	TELOGICA	KAILASHBEN ASHOKKUMAR PATEL	B	150000	17.91
533629	TIJARIA	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	305000	19.12
542803	VEL	HITESH SURENDRAKUMAR LOONIA	S	250000	10.8
542803	VEL	SANJAY KARANRAJ SAKARIA	B	235000	10.8
544157	VRUDDHI	STOCK VERTEX VENTURES	S	22000	139.5

NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
AAATECH	AAA Technologies Limited	JAINAM BROKING LIMITED	SELL	76753	126.45
AVONMORE	Av onmore Cap&Mgt Serv L	RAMBLE MARKETS PRIVATE LIMITED	SELL	325000	112
AVONMORE	Av onmore Cap&Mgt Serv L	SAHI TRADING PRIVATE LIMITED	BUY	145000	112.01
AVONMORE	Av onmore Cap&Mgt Serv L	SUBHASH P RATHOD	BUY	216321	111.99
GLOBE	Globe Textiles (I) Ltd.	AVANCE VENTURES PRIVATE LIMITED	BUY	5000000	3.4
BIRDYS	Grill Splendour Ser Ltd	RAJESH SHANTILAL VAKHARIA	BUY	42000	127.37
IPL	India Pesticides Limited	WINRO COMMERCIAL INDIA LIMITED	BUY	683711	229.52
KANDARP	Kandarp Dg Smart Bpo Ltd	PRITESH PRAKASH CHAVAN	SELL	60000	28.14
CBAZAAR	Net Avenue Technologies L	CHANAKYA OPPORTUNITIES FUND I	SELL	160000	20.5
ONEPOINT	One Point One Sol Ltd	BNP PARIBAS FINANCIAL MARKETS	BUY	986663	54.75
RBS	Ramdevbaba Solvent Ltd	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	176000	117.3
RBA	Restaurant Brand Asia Ltd	FMRC FIDELITY EMERGING MARKETS FUND	SELL	2584580	100.26
SUMEETINDS	Sumeet Ind Limited	ESAAR (INDIA) LIMITED	SELL	1000000	2.2
TGL	Teerth Gopicon Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	60000	164.9
TGL	Teerth Gopicon Limited	VORA FINANCIAL SERVICES PVT LTD	SELL	60000	175.19

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