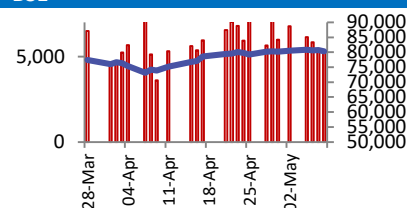
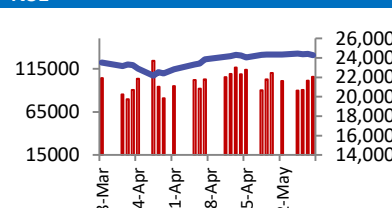


BSE



Open	80912
High	80928
Low	79988
Close	80335
Change	-412
Volume (Lacs)	6358
Turnover (Rs.inCr)	5363

NSE



Open	24432
High	24447
Low	24150
Close	24274
Change	-141
Volume(Lacs)	34036
Turnover(Rs.in Cr)	105606

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	41368	41114	254	0.6%
Dow Futures	41506	41468	38	0.1%
Nasdaq	17928	17738	190	1.1%
FTSE	8532	8559	(28)	-0.3%
Nikkei	37479	36929	550	1.5%
Hang Seng	22757	22776	(19)	-0.1%
Gift Nifty	23978	24189	(211)	-0.9%
Straits Singapore	3873	3848	25	0.6%
South Korea	2579	2579	(1)	0.0%
Taiwan	20770	20543	227	1.1%
Shanghai	3340	3352	(12)	-0.4%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9432	9420	12	0.1%
Alumin (\$/MT)	2413	2383	30	1.3%
Zinc (\$/MT)	2619	2617	3	0.1%
Brent Crude (\$/bbl)	63	63	0	0.4%
Gold (\$/Ounce)	3302	3306	(3)	-0.1%
Silver (\$/Ounce)	32	32	(0)	-0.2%
Light Crude (\$/bbl)	60	60	0	0.4%
N G (\$/mmbtu)	4	4	0	0.8%
Sugar (\$/MT)	495	485	10	2.0%
Rubber (Rs./kg)	195	196	(1)	-0.3%
Baltic Dry Index	1316	1374	(58)	-4.2%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	85.72	84.83	1.05%
Rs./ Euro	96.74	96.34	0.42%
Rs./Chinese Yuan	11.83	11.84	-0.08%
Yen / \$ rate	145.69	145.91	-0.15%
\$ US/Euro	1.12	1.12	-0.10%

Dollar Index	Current	Previous	Var(%)
Dollar Index	100.73	100.64	0.09%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24000	54000
Support 2	23870	53740
Resistance	24400	54540

Securities in Ban For Trade	
CDSL	
RBLBANK	MANAPPURAM

Market Review

US: U.S. stocks climbed on Thursday after President Donald Trump announced a trade deal framework with the United Kingdom, the first major agreement since the US imposed widespread tariffs earlier this year.

Asia: Asian stocks inched higher on Friday after US President Donald Trump announced a trade deal with the UK and signaled tariffs on Chinese goods may fall if upcoming talks go well.

India: Indian equity benchmark indices settled in red on Thursday after tensions between India and Pakistan escalated after Ministry of Defense said that as a part of Operation Sindoor, Indian Forces neutralized air defense radars and related systems at several locations in Pakistan. **Market is expected to open on a gap down note and likely to witness range bound move during the day.**

Global economy: The latest economic data reveals a slight decrease in U.S. Wholesale Inventories, a key indicator of the total value of goods held in inventory by wholesalers. This event, closely watched by economists and investors, has seen the actual figure falling to 0.4%. This figure falls short of the forecasted 0.5%, indicating a lower than expected inventory buildup. This suggests a slight slowdown in the accumulation of unsold goods, which could be interpreted as a sign of increased consumer demand or more efficient inventory management by wholesalers.

According to data from the Central Statistics Office, Ireland's annual CPI increased to 2.2% in April, a rise from 2.0% in the previous month. The index also showed a month-on-month growth of 0.4%. In addition to the CPI, the Harmonized Index of Consumer Prices also experienced an increase. The HICP, which excludes mortgage interest costs in its calculation, rose to 2% year-on-year, up from 1.8%.

Commodities: Oil prices remained steady on Friday after a previous surge, buoyed by easing U.S.-China trade tensions and a new U.S.-Britain trade agreement.

Gold prices firmed on Friday, as investors bought bullion following a decline in the previous session, while markets looked ahead to U.S.-China trade talks due this weekend.

Currency: The dollar headed for a weekly gain on most major peers as a U.S.-UK trade deal raised hopes of progress in looming U.S.-China talks, while bets of imminent U.S. rate cuts receded after the Federal Reserve indicated it was in no hurry.

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	37802	6639	30796	5301	1338	171748	29300	166488	28645	5260	655
Index Option	14668367	2662282	14177376	2574740	87542	2134487	376185	3099353	555569	(964866)	(179384)
Stock Future	447109	27670	468287	28568	(898)	6021749	371557	5988235	374402	33514	(2845)
Stock Option	949730	61427	947091	60670	757	1263438	77502	1180387	73315	83051	4187
Total	16103008	2758018	15623550	2669279	88739	9591422	854544	10434463	1031931	(843041)	(177387)

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
30-Apr-25		25357	25184	173
2-May-25		18050	15244	2807
5-May-25		10469	8673	1796
6-May-25		13482	9470	4011
7-May-25		16404	13452	2952
Month to date- May		58405	46839	11566
FII (Prov.) (Rs. Cr)		Buy	Sell	Net
2-May-25		18130	15360	2770
5-May-25		9366	8868	498
6-May-25		13471	9677	3795
7-May-25		16372	13786	2586
8-May-25		22366	20358	2008
Month to date-May		79705	68049	11656
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
2-May-25		13906	10616	3290
5-May-25		13918	11129	2789
6-May-25		10963	12361	(1398)
7-May-25		13169	10791	2378
8-May-25		12683	13279	(596)
Month to date-May		64639	58175	6464
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
30-Apr-25		3134	4949	(1816)
2-May-25		1618	1317	301
5-May-25		1706	1095	611
6-May-25		3311	4535	(1224)
7-May-25		2657	4078	(1421)
Month to date- May		9292	11025	(1733)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1335	33%	852	29%
Decline	2570	64%	1977	68%
Unchanged	127	3%	77	3%

Market Turnover	08-May	07-May	Var (%)
BSE Cash	5363	5315	1%
NSE Cash	105606	101223	4%
NSE Futures	135481	117230	16%
NSE Options	46852514	21217231	121%
Total (Rs.Cr)	47098964	21441000	120%

Volatility Index	08-May	07-May
Volatility Index	21.01	19.06

Index PE - TTM	08-May	Yr. High	Yr. Low
Sensex	22.4	25.2	20.3
Nifty	21.9	24.4	19.6

Corporate News
BPCL to develop Windfarm projects

BPCL has awarded contracts for the development of 100 MW Windfarm Projects - 50 MW each in MP and Maharashtra - as part of its strategy to transition to renewable energy and reduce reliance on imported fossil-based power. Letters of Award have been issued to Suzlon Energy for the wind project in MP and to Integrum Energy Infra for the project in Maha which are expected to be completed and commissioned within two years. (BL)

Mastek partners with Zulekha HC

Mastek has partnered with Zulekha HC Group to deploy an extensive Oracle Fusion Cloud suite (which closely integrates with Oracle Health Cerner) system that aligns with Zulekha's vision of delivering "Patient First" healthcare while enhancing clinical workflows, operational efficiency, and fiscal agility. (NDTV)

Uno Minda plans for Rs.200 cr capex

Uno Minda has approved the setting up of a manufacturing facility for two-wheeler alloy wheels in Bawal, Haryana with production capacity of ~ 1.5 mn alloy wheels annually at a cost of ₹200 cr. (NDTV)

Economy
India to cut duty only from 6th year on PLI-backed medical devices in UK trade pact

India will reduce import duties on medical devices covered in the PLI scheme only from the sixth year onward, under its free trade agreement with the UK, a govt official said. (ET)

India-UK FTA: Auto duty cuts in 10-15 yrs; safeguards in place to protect industry

India and the UK have finalized a free trade agreement. It aims to double commerce by 2030. The deal lowers tariffs on Indian exports. British firms will find it easier to export to India. Duty reductions on cars will occur over 10-15 years. Quotas will limit petrol, diesel, and electric vehicle imports. The FTA offers opportunities for India's services sector. (ET)

International
Bain Capital to sell China data centre business likely valued at over \$4 bn

Bain Capital is seeking to sell the China business of data centre operator WinTriX DC Group, in a deal that could value the business at over \$4 bn. Bain Capital has engaged with advisers who have held preliminary conversations with potential buyers in recent months, said the people, declining to be named as the information was not public. (Invst)

Top 5 Nifty Gainers	08-May	07-May	Var(%)
HCLTECH	1581	1563	1.1%
AXISBANK	1172	1161	0.9%
TITAN	3369	3339	0.9%
KOTAKBANK	2113	2095	0.8%
COALINDIA	385	383	0.6%
Top 5 Nifty Losers	08-May	07-May	Var(%)
SHRIRAMFIN	616	637	-3.3%
ETERNAL	230	237	-3.0%
ADANIENT	2285	2353	-2.9%
M&M	3033	3120	-2.8%
TATACONSUM	1116	1146	-2.6%

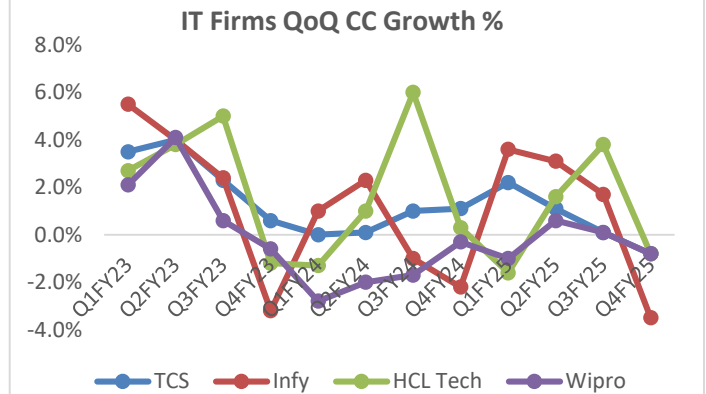
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	80335	-0.5%	0.1%	8.8%	11.0%
MIDCAP	42154	-1.9%	-1.7%	6.6%	3.6%
SMLCAP	46883	-1.0%	-1.1%	5.5%	4.1%
AUTO	50792	-1.9%	1.7%	12.5%	-1.2%
BANKEX	61742	-0.2%	-1.4%	7.4%	13.8%
Capital Goods	61821	-0.9%	-1.5%	7.9%	1.8%
FMCG	20313	-1.0%	-0.7%	1.8%	3.4%
Health Care	41288	-1.6%	-2.2%	4.4%	20.1%
IT	35267	0.1%	0.6%	10.1%	3.7%
METAL	28573	-1.8%	-1.6%	7.3%	-5.9%
Oil & Gas	26216	-2.0%	-1.0%	8.9%	-4.5%
Power	6441	-1.9%	-3.1%	1.5%	-7.9%
Realty	6530	-2.6%	-4.9%	8.1%	-11.3%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	69246	0.9%	0.5%	-0.9%	-11.5%
Fresh Exposure	4460	-15.7%	-11.4%	11.8%	-6.0%
Exposure liquidated	4998	6.8%	4.8%	-15.0%	26.4%
Closing Net scripwise outstanding	68708	-0.8%	-0.7%	1.0%	-13.1%

NSE USD Futures	08-May	07-May	Var (%)
Apr Expiry (Rs./\$)	87.00	87.00	0.0%
May Expiry (Rs./\$)	87.56	87.56	0.0%
Total Turnover (Rs. Crore)	4497	2433	85%

Sectors	TTM PE
Auto	29.55
Auto Ancillary	40.53
Banking	14.07
Engineering	47.17
Cement	73.95
Diamonds & Jewellery	40.93
Housing Finance	24.61
Infrastructure & Const	27.99
Metals-Aluminium	26.57
Metal – Steel	16.92
Oil Expl.	7.67
Pharma	9.2
Power – Gen. Supp.	38.95
Information Tech.	26.95
Sugar	18.59
Telecom Serv. Prov.	47.74
Tyres	30.91

Indian IT Firms Growth (Source: NBRR)



10 year G-Sec Yield	Current	Previous	Change
US	4.36%	4.38%	(2) bps
Japan	1.37%	1.34%	4 bps
India	6.40%	6.34%	6 bps
UK	4.55%	4.46%	9 bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	688	688	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)	1564	1571	(7.2)

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	17.49	11433459	17.71	5478956	-1.24%	1	1499.22	1511.40	-0.8%
Wipro	2.80	10977766	2.90	5444367	-3.45%	1	240.01	241.57	-0.6%
Dr.Reddy's	13.18	1854791	13.52	1843301	-2.51%	1	1129.77	1148.00	-1.6%
ICICI Bank	32.33	11632816	33.80	4157702	-4.35%	2	1385.64	1435.50	-3.5%
HDFC Bank	69.50	5056969	72.83	2636478	-4.57%	3	1985.82	1928.50	3.0%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	38.70	39.30	(0.6)	-1.5%
RIL	64.40	66.30	(1.9)	-2.9%
SBI	89.10	91.50	(2.4)	-2.6%

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%	-0.70%

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	10 May

Event Update

Name	Date	Purpose
Anand Rathi Wealth Ltd.	09/05/25	Rs.7.00 per share(140%)Final Dividend
Bajaj Finance Ltd.	09/05/25	Equity Rs.12.00 per share(600%)Special Dividend
Bank Of Maharashtra	09/05/25	Rs.1.50 per share(15%)Final Dividend
Laurus Labs Ltd.	09/05/25	Rs.0.80 per share(40%)Second Interim Dividend
Nakoda Group of Industries Ltd. - (NGILPP)	09/05/25	Second and Final Call of Rs. 10/- (Rs.4/- Face Value +Rs. 6/- Premium)
Navkar Urbanstructure Ltd.	09/05/25	Stock Split from Rs.2/- to Re.1/-
Shantai Industries Ltd.	09/05/25	Stock Split from Rs.10/- to Rs.2/-
Transformers & Rectifiers (India) Ltd.	09/05/25	Rs.0.20 per share(20%)Final Dividend

Bulk Deal As On 08/05/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
530187	ATHARVENT	GREEN PEAKS ENTERPRISES LLP	S	118050	5.76
530187	ATHARVENT	GREEN PEAKS ENTERPRISES LLP	B	125064	5.8
530187	ATHARVENT	SUSHEEL RADHEY SHYAM	S	136618	5.8
530187	ATHARVENT	VIVEK KANDA	S	93100	4.92
543211	BONLON	ANKUR AGARWAL HUF	S	82283	44.47
543211	BONLON	ANKUR AGARWAL HUF	B	82283	42.51
543211	BONLON	SYLPH TECHNOLOGIES LIMITED	S	26641	41.72
543211	BONLON	SYLPH TECHNOLOGIES LIMITED	B	76641	39.96
539598	CGFL	ARUN KUMAR GANERIWALA	S	400000	24.5
539405	DITCO	SHASHANK CHOUDHARY	B	23179	11.86
521137	EUREKAI	RANJANA VINOD SHUKLA	S	50423	9.99
532015	GRAVITY	DAKSHABEN RASIKLAL THAKKAR	S	121336	4.6
532015	GRAVITY	GROWNOURISH TRADING PRIVATE LIMITED	B	125000	4.6
544160	JAYKAILASH	AJAY JAMNALAL PUJARA	S	32000	67.63
540360	LLFICL	FETTECH COMMERCIAL ENTERPRISES PRIVATE LIMITED	S	10385100	6.3
540360	LLFICL	VARADA TRADING PRIVATE LIMITED	B	3000000	6.3
543207	NATURAL	HEMA JAYPRAKASH BHAVSAR	B	483358	10.28
543400	OMNIPOTENT	ASHOK DILIPKUMAR JAIN	B	234000	11.32
543400	OMNIPOTENT	SURAJADIGA	S	86000	11.34
530095	PRADHIN	SAKET KUMAR	S	31452	0.4
530095	PRADHIN	SAKET KUMAR	B	5736995	0.43
526490	PRATIK	GHANSHYAM DHANANJAY GAVALI	S	500000	6.79
526490	PRATIK	RUTUJA RAOSAHEB BHOR	S	618097	6.89
534708	SHANTIGURU	MUKESHKUMARJAIN	S	78000	8.41
534708	SHANTIGURU	ROOPAL SHREYANS LODHA	B	69000	8.41
539584	SIPTL	ALKABEN PRADIPKUMAR SHAH	B	3303125	0.45
539117	SUJALA	NIVESH CONSULTANCY PRIVATE LIMITED	S	33688	56.3
530217	SWOJAS	MOHAMED IRFAN MOHAMED LATIF SHAIKH	S	500	21.55
530217	SWOJAS	MOHAMED IRFAN MOHAMED LATIF SHAIKH	B	518491	21.76
530217	SWOJAS	PARTHRAJSINH HARSHADSINH RANA	S	675000	21.76
506687	TRANSPEK	UNIFI CAPITAL PRIVATE LIMITED	S	40000	1501.35
538918	VANICOM	DHRUV KIRAN SINGHVI	B	75000	11.59
533427	VMS	TARADEVI RATANLAL BAFNA	S	129511	23.27

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ARUNAYA	Arunaya Organics Limited	MNM STOCK BROKING PVT LTD	BUY	100000	33.15
ARUNAYA	Arunaya Organics Limited	TRADEDEAL FINANCIAL SERVICES PRIVATE LIMITED	SELL	90000	33.15
DHARIWAL	Dhariwalcorp Limited	BAHETI PANKAJ HUF	SELL	100800	115
DHARIWAL	Dhariwalcorp Limited	LALCHAND BODHWANI HUF	BUY	55200	121
GATDVR-RE	GACM Technologies Ltd	ASHUTOSH MISHRA	BUY	500000	0.04
GATDVR-RE	GACM Technologies Ltd	HANIFABIBI ABDUL HAMID SHAIKH	SELL	447443	0.04
GATDVR-RE	GACM Technologies Ltd	KALARATRI TRADEWING LLP	SELL	878092	0.04
GATDVR-RE	GACM Technologies Ltd	KARTHIK SOMASHEKHAR	BUY	1000000	0.04
GATDVR-RE	GACM Technologies Ltd	RUTU PREYANK PATEL	SELL	640609	0.04
GATDVR-RE	GACM Technologies Ltd	VINAY KUMAR TEKRIWAL	BUY	400000	0.04
GATDVR-RE	GACM Technologies Ltd	YASMIN MAHEBOOB AJMERWALA	SELL	620178	0.04
GANGAFORGE	Ganga Forging Limited	JAYDEEP CHANDUBHAI KOTWANI	SELL	1000000	4.9
GANGAFORGE	Ganga Forging Limited	MANSUKH SECURITIES & FINANCE LTD	BUY	1000000	4.9
INDSWFTLAB	Ind-Swift Labs Ltd.	WILSON HOLDINGS PRIVATE LIMITED	SELL	506000	70.87
KALANA	Kalana Ispat Limited	GOLDENDUNES BUILDERS AND DEVELOPERS PRIVATE LIMITED	BUY	90000	46.99
KAMDHENU	Kamdhenу Ispat Limited	NITESH SHASHIKANT KHATATE	SELL	1610079	27.65
KAMOPAINTS	Kamdhenу Ventures Limited	AL MAHA INVESTMENT FUND PCC-ONYX STRATEGY	SELL	4500000	10.63
KAMOPAINTS	Kamdhenу Ventures Limited	BRIDGE INDIA FUND	BUY	4500000	10.63
TECHERA	TechEra Engineer (Ind) L	LAROIA MONA	BUY	100000	139.85
TRANSTEEL	TransteeI Seating Tech L	CHAUBARA EATS PRIVATE LIMITED	SELL	132000	106.06
WOMANCART	Womancart Limited	ABHISHEK AGARWAL	SELL	27200	248.52
WOMANCART	Womancart Limited	BANSAL SANDEEP	SELL	32400	246.25

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