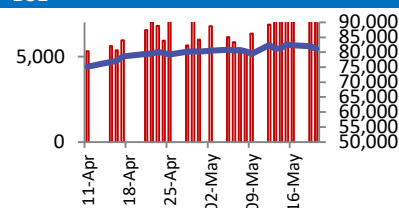
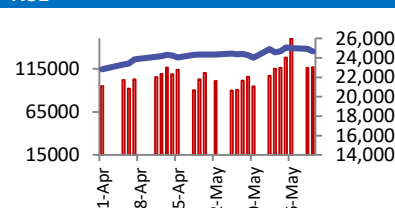


## BSE



Open	82116
High	82250
Low	81154
Close	81186
Change	-873
Volume (Lacs)	8168
Turnover (Rs.inCr)	7875

## NSE



Open	24996
High	25010
Low	24670
Close	24684
Change	-262
Volume(Lacs)	43037
Turnover(Rs.in Cr)	116851

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	42677	42792	(115)	-0.3%
Dow Futures	42669	42772	(103)	-0.2%
Nasdaq	19143	19215	(73)	-0.4%
FTSE	8781	8699	82	0.9%
Nikkei	37492	37529	(38)	-0.1%
Hang Seng	23870	23681	188	0.8%
Gift Nifty	24799	24775	25	0.1%
Straits Singapore	3874	3883	(9)	-0.2%
South Korea	2627	2602	25	1.0%
Taiwan	21693	21526	167	0.8%
Shanghai	3391	3380	10	0.3%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9520	9524	(4)	0.0%
Alumin (\$/MT)	2472	2450	22	0.9%
Zinc (\$/MT)	2711	2677	34	1.3%
Brent Crude (\$/bbl)	66	65	1	1.5%
Gold (\$/Ounce)	3302	3290	12	0.3%
Silver (\$/Ounce)	33	33	(0)	-0.2%
Light Crude (\$/bbl)	63	62	1	1.6%
N G (\$/mmbtu)	3	3	(0)	-1.0%
Sugar (\$/MT)	487	490	(2)	-0.5%
Rubber (Rs./kg)	197	197	0	0.0%
Baltic Dry Index	1340	1347	(7)	-0.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	85.64	85.40	0.27%
Rs./ Euro	96.39	96.32	0.07%
Rs./Chinese Yuan	11.88	11.87	0.12%
Yen / \$ rate	143.86	144.51	-0.45%
\$ US/Euro	1.13	1.13	0.35%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.68	100.12	-0.44%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24600	54870
Support 2	24540	54600
Resistance	24740	55340

Securities in Ban For Trade	
RBLBANK	MANAPPURAM

## Market Review

**US:** Market fell on Tuesday as the rally led by major technology firms slowed, bringing the S&P 500's six-day rise to a close.

**Asia:** Market moved higher on Wednesday after Wall Street's six-day winning streak came to an end. Stock benchmarks in Japan, South Korea, and Australia advanced, lifting a broader index of regional shares by 0.4% during early trading.

**India:** The benchmark equity indices closed lower for the third consecutive session on Tuesday amid volatility in the domestic stock markets. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

**Global economy** Japan's trade balance unexpectedly recorded a deficit in April, as rising U.S. trade tariffs and a stronger yen pressured export performance, while imports proved more resilient than anticipated. Government data released on Wednesday showed a trade deficit of ¥115.8 bn, significantly missing forecasts for a ¥227.1 bn surplus and reversing the previous month's ¥559.4 bn surplus. Export growth slowed markedly, increasing by only 2% year-on-year compared to a 4% rise in the previous month, in line with expectations.

The latest report from the API revealed an unexpected increase in U.S. crude oil, gasoline, and distillate inventories. Crude stockpiles rose by 2.499 mn barrels, significantly diverging from the anticipated decline of 1.850 mn barrels. This surprise build signals potentially weaker demand for crude oil, which may exert downward pressure on prices. Although current inventory levels are lower than the previous figure of 4.287 mn barrels, the smaller-than-expected drawdown suggests that market demand may not be as robust as initially projected. The API's data remains a key indicator of U.S. petroleum demand and broader market sentiment.

**Commodities:** Oil prices jumped more than 1% on Wednesday after reports Israel is preparing a strike on Iranian nuclear facilities, raising fears that a conflict could upset supply availability in the key Middle East producing region.

Gold prices rose on Wednesday as the dollar slipped to a two-week low and investors sought safety amid U.S. fiscal uncertainty, with Congress debating a sweeping tax bill.

**Currency:** The U.S. dollar edged lower on Wednesday, extending a two-day slide against major peers, as President Donald Trump failed to convince Republican holdouts to back his sweeping tax bill.

**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	15734	2791	30984	5575	(2784)	149522	26130	152988	27017	(3466)	(887)
Index Option	6190176	1148053	6156688	1141411	6642	3025495	545448	2810899	511179	214596	34269
Stock Future	339495	21864	401917	25897	(4033)	5939807	378586	5965303	385566	(25496)	(6980)
Stock Option	1269871	85217	1312415	87965	(2748)	1790932	114255	1699804	110096	91128	4159
Total	<b>7815276</b>	<b>1257925</b>	<b>7902004</b>	<b>1260848</b>	<b>(2923)</b>	<b>10905756</b>	<b>1064419</b>	<b>10628994</b>	<b>1033858</b>	<b>276762</b>	<b>30561</b>

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
13-May-25		17669	17505	164
14-May-25		15095	14165	931
15-May-25		21440	15694	5747
16-May-25		19835	12351	7483
19-May-25		13411	12473	938
<b>Month to date- May</b>		<b>192634</b>	<b>165766</b>	<b>26868</b>
FII (Prov.) (Rs Cr)		Buy	Sell	Net
14-May-25		14861	13929	932
15-May-25		21412	16019	5393
16-May-25		21380	12549	8831
19-May-25		11817	12343	(526)
20-May-25		14789	24805	(10016)
<b>Month to date-May</b>		<b>205453</b>	<b>192212</b>	<b>13241</b>
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
14-May-25		13603	13287	316
15-May-25		14750	16418	(1668)
16-May-25		16972	11785	5187
19-May-25		10988	11226	(238)
20-May-25		15377	8638	6738
<b>Month to date-May</b>		<b>183111</b>	<b>153312</b>	<b>29799</b>
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
13-May-25		1705	4200	(2495)
14-May-25		2317	3989	(1672)
15-May-25		1426	2211	(784)
16-May-25		1348	1893	(545)
19-May-25		1126	2297	(1171)
<b>Month to date- May</b>		<b>24508</b>	<b>31503</b>	<b>(6995)</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1341	33%	842	29%
Decline	2642	64%	2034	69%
Unchanged	121	3%	63	2%

Market Turnover	20-May	19-May	Var (%)
BSE Cash	7875	8630	-9%
NSE Cash	116851	116116	1%
NSE Futures	138827	113194	23%
NSE Options	13291395	9799632	36%
Total (Rs.Cr)	13554948	10037573	35%

Volatility Index	20-May	19-May
Volatility Index	17.39	17.36

Index PE - TTM	20-May	Yr. High	Yr. Low
Sensex	22.6	25.2	20.3
Nifty	22.1	24.4	19.6

**Corporate News**
**Senores Pharma acquires USFDA-approved ANDA for Enalapril Maleate Tablets from Wockhardt**

Senores Pharma Ltd has entered into an agreement to acquire the USFDA-approved Abbreviated New Drug Application for Enalapril Maleate Tablets in four strengths: 2.5 mg, 5 mg, 10 mg, and 20 mg. The ANDA is being acquired from Wockhardt Ltd. (NDTV)

**Patel Eng bags a hydropower project of Rs. 711.29 cr**

NEEPCO has awarded a contract valued at Rs. 711.29 cr to Patel Eng Ltd for the construction of the 240 MW HEO Hydropower Project located in Arunachal Pradesh under EPC Mode. (NDTV)

**United Breweries leases Ilios facility in Andhra to ramp up Kingfisher production**

United Breweries has entered a leasing agreement with Ilios Breweries Ltd. to ramp up manufacturing capacity in AP. The move is aimed at strengthening its supply chain and meeting rising demand for Kingfisher beer and other offerings in the region. (NDTV)

**Economy**
**India tightens safety norms to curb low-quality Chinese appliance imports, boost local manufacturing**

Gol is pushing ahead with measures to curb imports of small consumer appliances and electronic lifestyle items from China by unveiling new stricter product safety norms. This follows recent discovery of poor quality electronic appliances sourced from China. (ET)

**Trump's new tax remittance plan could drain billions of dollars from Indian Economy**

India faces a dual challenge as Trump's tightening of immigration policies threatens to disrupt the multi-bn-dollar remittance flow to the country. Alongside the migration curbs, a proposed US tax on remittances could further burden Indian workers sending money home. (ET)

**International**
**Toyota revamps RAV4 SUV for global launch, debuts new software system**

Toyota unveiled an overhauled RAV4 and said the compact sport utility vehicle would be the first Toyota model to be equipped with the Japanese automaker's Arene software development platform. (Invst)

Top 5 Nifty Gainers	20-May	19-May	Var(%)
COALINDIA	408	403	1.3%
ONGC	249	247	1.1%
TATASTEEL	159	158	0.7%
HINDALCO	663	658	0.7%
DRREDDY	1224	1219	0.4%
Top 5 Nifty Losers	20-May	19-May	Var(%)
ETERNAL	228	238	-4.1%
HEROMOTOCO	4242	4388	-3.3%
BAJAJ-AUTO	8565	8851	-3.2%
SHRIRAMFIN	658	678	-2.9%
MARUTI	12638	12989	-2.7%

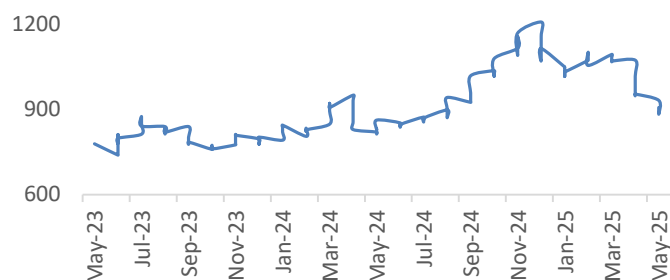
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	81186	-1.1%	0.0%	2.2%	9.8%
MIDCAP	44385	-1.6%	1.3%	3.5%	2.8%
SMLCAP	50938	-1.0%	3.6%	4.5%	6.4%
AUTO	52731	-2.1%	1.6%	7.8%	-0.7%
BANKEX	62349	-1.0%	-0.4%	-1.7%	13.5%
Capital Goods	67978	-1.2%	3.1%	9.2%	0.5%
FMCG	20554	-1.1%	0.2%	0.7%	3.8%
Health Care	42203	-1.1%	0.5%	0.6%	18.1%
IT	36803	-0.4%	0.3%	9.2%	8.0%
METAL	30943	-0.2%	3.7%	5.8%	-8.6%
Oil & Gas	27131	-0.7%	2.0%	3.3%	-6.9%
Power	6741	-1.4%	2.0%	-2.1%	-13.0%
Realty	7154	-1.1%	6.6%	6.8%	-9.2%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	70788	1.2%	3.3%	4.3%	-6.1%
Fresh Exposure	8293	-2.4%	38.9%	61.4%	145%
Exposure liquidated	6594	-14.0%	8.3%	25.1%	39.6%
Closing Net scripwise outstanding	72487	2.4%	6.0%	7.0%	-2.1%

NSE USD Futures	20-May	19-May	Var (%)
Apr Expiry (Rs./\$)	86.00	86.00	0.0%
May Expiry (Rs./\$)	85.46	85.46	0.0%
Total Turnover (Rs. Crore)	4260	4075	5%

Sectors	TTM PE
Auto	32.01
Auto Ancillary	42.04
Banking	13.98
Engineering	49.33
Cement	77.95
Diamonds & Jewellery	44.27
Housing Finance	24.49
Infrastructure & Const	29.45
Metals-Aluminium	28.99
Metal – Steel	18.34
Oil Expl.	8.43
Pharma	9.38
Power – Gen. Supp.	38.43
Information Tech.	27.53
Sugar	18.97
Telecom Serv. Prov.	37.33
Tyres	31.94

### Palm oil price (USD/Metric Tonne) (Source: BBG)



10 year G-Sec Yield	Current	Previous	Change
US	4.50%	4.49%	2 bps
Japan	1.53%	1.51%	3 bps
India	6.27%	6.29%	(3) bps
UK	4.70%	4.66%	4 bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	691	691	0.0%
Inflation - WPI	0.85%	2.05%	(120) bps
Inflation - CPI	3.16%	3.34%	(18) 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)	2083	2330	(247.0)

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	18.24	7065541	18.33	9394498	-0.49%	1	1562.00	1560.60	0.1%
Wipro	2.91	2444569	2.95	2770692	-1.36%	1	249.20	249.71	-0.2%
Dr.Reddy's	14.50	1629582	14.46	1252614	0.28%	1	1241.72	1224.20	1.4%
ICICI Bank	34.00	5408371	34.30	3235375	-0.87%	2	1455.82	1438.20	1.2%
HDFC Bank	73.07	1649575	73.78	1332136	-0.96%	3	2085.81	1914.90	8.9%

## GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	41.75	42.25	(0.5)	-1.2%
RIL	66.50	67.50	(1.0)	-1.5%
SBI	92.10	93.10	(1.0)	-1.1%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.30%	2.40%
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	12 June
Indian Inflation Data WPI	16 June
Indian Monetary Policy	06 Jun
India's Industrial Production (IIP)	28 May
US Inflation Data	11 June
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
Aditya Birla Fashion and Retail Ltd.	22/05/25	Spin Off
Ashok Leyland Ltd.	22/05/25	Second Interim Dividend
Emami Ltd.	22/05/25	Third Interim Dividend
GM Breweries Ltd.	22/05/25	Rs.7.50 per share(75%)Final Dividend
BSE Ltd.	23/05/25	Bonus
Keystone Realtors Ltd	23/05/25	Rs.1.50 per share(15%)Final Dividend
LTIMindtree Ltd.	23/05/25	Rs.45.00 per share(4500%)Final Dividend
SEPC Ltd.	23/05/25	Right Issue of Equity Shares
Sula Vineyards Ltd.	23/05/25	Rs.3.60 per share(180%)Final Dividend
Viksit Engineering Ltd.	23/05/25	Resolution Plan-Reduction of Capital



## Bulk Deal As On 20/05/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
538539	ANVRDHI	HEMALI AMIT PANDYA	S	118984	17.64
538539	ANVRDHI	HEMALI AMIT PANDYA	B	115040	17.66
512149	AVANCE	AKARSHIKA TRADERS LLP	S	11000000	0.81
531458	BOSTONBIO	AMUL VIJAYVERGIYA	S	45000	7.29
544387	DESCO	UJWAL ARORA	S	40000	242.6
532922	EDELWEISS	CARNELIAN ASSET MANAGEMENT & ADVISORS PRIVATE LIMITED	B	8000000	90.4
532922	EDELWEISS	EDELWEISS EMPLOYEES WELFARE TRUST	S	16000000	90.4
531723	GATECH	MOOLCHAND KIRAN KUMAR JAIN	S	3504137	0.9
544348	GBLOGISTIC	CHANAKYA OPPORTUNITIES FUND I	S	49200	47.34
544348	GBLOGISTIC	SOMANI VENTURES AND INNOVATIONS LIMITED	B	48000	47.34
542851	GENSOL	EPITOME TRADING AND INVESTMENTS	B	232217	70.99
532015	GRAVITY	VIVEK KANDA	B	50000	5.76
505336	HARSHILAGR	STROTRAM GLOBE PRIVATE LIMITED	S	12263348	2.37
505336	HARSHILAGR	STROTRAM GLOBE PRIVATE LIMITED	B	9315456	2.41
505336	HARSHILAGR	VISHMOR TRADING PRIVATE LIMITED	S	6148196	2.35
543546	HEALTHYLIFE	NIGHTINGALE GROWTH	B	234000	60.99
500220	JASCH	NIKUNJ CHAMPAKLAL DOSHI	S	37250	200.05
532397	KONNDOR	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	30000	12.52
532397	KONNDOR	POURNIMA JAYVANT NICHITE	B	80000	12.52
532397	KONNDOR	RIYA VINIT AGRAWAL	S	255000	12.52
532397	KONNDOR	VINIT KUMAR P AGRAWAL	S	255000	12.52
532397	KONNDOR	VIVEK KANDA	B	30000	12.52
532397	KONNDOR	YASHASHRI SUBODH JADHAV	B	309916	12.52
514360	KRRAIL	MULTITUDE GROWTH FUNDS LIMITED	S	181875	77
540360	LLFICL	ZEAL GLOBAL OPPORTUNITIES FUND	S	4000000	7
540809	MRCAGRO	QUANTSEYE AI PRIVATE LIMITED	S	138282	18.25
540809	MRCAGRO	RUDAY YASHVANTKUMAR PATEL	S	174000	18.25
540809	MRCAGRO	SARIKA SARAF	B	117000	18.15
531512	ORIENTTR	ALNASIR ABDUL AZIZ GILANI	S	70000	19.98
540198	OSIAJEE	NEERAJ KUMAR SINGLA	S	46013	206.83
544141	PESB	PANKAJ PRASOON AND (HUF)	B	86400	137.7
530095	PRADHIN	JNSP TRADING LLP	S	6450000	0.36
531822	RODIUM	DIVYESH GAUTAMBHAI SHAH	S	18000	178.5
543924	SONALIS	KARTIKASHOKBHAISHAH	S	70000	56.86
543924	SONALIS	NIRAV PRAKASHBHAI KANKARIAHUF	S	30000	56.86
543924	SONALIS	SONALI NILESH KOCHAREKAR	B	180000	56.86
511700	STANCAP	DULCET ADVISORY PRIVATE LIMITED	S	31480000	0.37
511700	STANCAP	JABIR MOHD SILAWAT	B	9000000	0.37
539117	SUJALA	KARISHMA TUSHAR PANSARE	S	39526	69.35
530217	SWOJAS	PARTHRAJSINH HARSHADSINH RANA	S	580997	24.3
530217	SWOJAS	PIYUSH VINODRAI PAREKH	B	636942	24.21
531499	SYBLY	GRID TRADING PRIVATE LIMITED	S	78148	3.61
531499	SYBLY	PREMIUM CAPITAL MARKET & INVESTMENTS LIMITED	B	100000	3.61
531499	SYBLY	VISAGAR FINANCIAL SERVICES LIMITED	S	78000	3.61
531432	SYTIXSE	NIBHA GOEL	S	47660	9
531432	SYTIXSE	NIBHA GOEL	B	47660	9
531432	SYTIXSE	OMKARMUNDHRA	B	94763	9
531432	SYTIXSE	RUSHANK SS LUNKAD	S	35000	9
531432	SYTIXSE	SNEHA SANJEEV LUNKAD	S	35500	9.07
532402	USGTECH	NANDANVAN COMMERCIAL PRIVATE LIMITED	B	392666	12.65
532402	USGTECH	RADHIKA GUPTA	S	198110	12.65
532402	USGTECH	VIPIN GUPTA	S	246869	12.61
522209	YOGISUNG	ZULIA ZAFAR	B	100000	14.9

## NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AGSTRA	AGS Transact Tech Ltd	DEVI TRADERS LLP	SELL	774668	5.06
AFIL	Akme Fintrade (India) Ltd	AKME BUILD ESTATE LIMITED	SELL	3700000	7.34
AFIL	Akme Fintrade (India) Ltd	MANJU DEVI JAIN	BUY	3700000	7.34
ARUNAYA	Arunay a Organics Limited	D3 STOCK VISION LLP	BUY	128000	44
ATALREAL	Atal Realtech Limited	TRADE CORNER	BUY	795000	14.99
BAHETI	Baheti Recycling Ind Ltd	SRISHTI SOMANI	SELL	83625	556.7
DCMFINSERV	DCM Financial Ser Ltd	SANDEEP SETHI	BUY	100000	7.93
GATECH-RE1	GACM Techno Ltd	SUBHASH CHANDRA	BUY	2999999	0.12
GANGAFORGE	Ganga Forging Limited	MANSUKH SECURITIES & FINANCE LTD	SELL	965186	5.1
GENSOL	Gensol Engineering Ltd	NEO APEX VENTURE LLP	BUY	362121	70.2
IITL	Industrial Inv Trust Ltd	ONE EARTH CAPITAL LIMITED	SELL	883745	170
IITL	Industrial Inv Trust Ltd	ONE EARTH CAPITAL LIMITED	SELL	883745	170
IITL	Industrial Inv Trust Ltd	SIX SIGMA INVESTMENTS FUND	BUY	883745	170
IITL	Industrial Inv Trust Ltd	SIX SIGMA INVESTMENTS FUND	BUY	883745	170
INTEGRITY	Integrity Infrabuild De L	ARYAMAN CAPITAL MARKETS LIMITED	BUY	73200	100.8
INTEGRITY	Integrity Infrabuild De L	DHRUMIL RAJENDRAKUMAR PATEL	BUY	28800	101
INTEGRITY	Integrity Infrabuild De L	EMERALD COMMERCIAL LIMITED	BUY	64800	100.81
LLOYDS-RE1	LLOYDS ENG WORKS LTD	LLOYDS ENTERPRISES LIMITED	SELL	5321141	14.47
PROTEAN	Protean eGov Techno Ltd	MASSACHUSETTS INSTITUTE OF TECHNOLOGY	SELL	401574	1026
SHANTI	Shanti Overseas (Ind) Ltd	GAURAV GADIYA	SELL	86090	18.43
SHEETAL	Sheetal Universal Limited	JNSP TRADING LLP	SELL	114000	114.88
VGINFOTECH	Virtual Galaxy Infotech L	VINOD KUMAR	SELL	372000	179.78

#### Disclosure:

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