

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	40528	40228	300	0.7%
Dow Futures	40577	40658	(81)	-0.2%
Nasdaq	17461	17366	95	0.5%
FTSE	8463	8417	46	0.5%
Nikkei	35903	35840	63	0.2%
Hang Seng	21970	22008	(38)	-0.2%
Gift Nifty	24331	24430	(99)	-0.4%
Straits Singapore	3820	3805	15	0.4%
South Korea	2547	2565	(19)	-0.7%
Taiwan	20297	20233	65	0.3%
Shanghai	3284	3287	(3)	-0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9384	9440	(57)	-0.6%
Alumin (\$/MT)	2457	2466	(9)	-0.4%
Zinc (\$/MT)	2645	2650	(5)	-0.2%
Brent Crude (\$/bbl)	64	64	(0)	-0.7%
Gold (\$/Ounce)	3308	3317	(10)	-0.3%
Silver (\$/Ounce)	33	33	(0)	0.0%
Light Crude (\$/bbl)	60	60	(1)	-0.8%
N G (\$/mmbtu)	3	3	(0)	-0.6%
Sugar (\$/MT)	497	505	(9)	-1.7%
Rubber (Rs./kg)	199	199	0	0.0%
Baltic Dry Index	1398	1403	(5)	-0.4%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	85.26	85.03	0.26%
Rs./ Euro	97.02	96.52	0.52%
Rs./ Chinese Yuan	11.72	11.72	0.02%
Yen / \$ rate	142.39	142.33	0.04%
\$ US/Euro	1.14	1.14	-0.14%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.36	99.24	0.12%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24240	55240
Support 2	24170	55000
Resistance	24400	55740

Securities in Ban For Trade
RBLBANK

## Market Review

**US:** Markets closed with major gains on Wednesday after President Trump announced a 90-day pause on some tariffs, marking a reversal from days earlier when Trump said the policy would "never change."

**Asia:** Asia-Pacific markets traded mixed Wednesday as traders parse a slew of key economic data in the region.

**India:** Indices settled mostly flat amid cautious stance over border tensions with Pakistan. However, positive FII inflows and supportive global cues improved the sentiments at Dalal Street. **Market is expected to open on a gap down and likely to witness range bound move during the day.**

**Global economy:** Chinese manufacturing activity shrank more than expected in April, as local producers were slammed by a sharp drop in overseas orders after Trump imposed steep trade tariffs against Beijing. The official manufacturing purchasing managers index read 49.0 in April, compared to expectations of 49.7 (sharp fall from the 50.5 seen in the prior month).

Japanese industrial production shrank much more than expected in March, as manufacturers scaled back output amid heightened economic and trade uncertainty, while retail sales grew less than expected. Industrial production fell 1.1% month-on-month, much more than expectations for a 0.5% drop. The print comes as Japan's major manufacturers grapple with the prospect of increased U.S. trade tariffs on the country. President Donald Trump unveiled a 24% tariff on Japan earlier in April, although he did pause the measure until July.

Australian consumer price index inflation grew slightly more than expected in the first quarter, while underlying inflation fell back into the Reserve Bank of Australia's target range, supporting the case for a rate cut. CPI grew 2.4% yoy in the first quarter, a similar pace seen in the prior quarter, but was just above expectations of 2.3%.

**Commodities:** Oil prices edged lower in early Asian trading on Wednesday as President Donald Trump's erratic tariff policies raised concerns about weakening global economic growth and fuel demand.

Gold prices held their ground on Wednesday as investors awaited potential trade developments between the United States and its trading partners and also key U.S. inflation data for clues on the Federal Reserve's policy path.

**Currency:** The US dollar was steady on Wednesday but poised for its weakest monthly performance since November 2022 as erratic U.S. trade policies under President Donald Trump left the greenback vulnerable while boosting the euro, yen and Swiss franc.

### 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	21081	3707	16202	2797	910	157047	26941	148556	25452	8491	1489
Index Option	7061465	1273259	7133097	1284749	(11490)	2872272	515694	2488766	446108	383506	69586
Stock Future	274046	17058	277574	17274	(216)	5891507	368461	5848795	366491	42712	1970
Stock Option	704995	47476	703308	47721	(245)	823234	51689	737417	46144	85817	5545
Total	8061587	1341500	8130181	1352541	(11041)	9744060	962785	9223534	884195	520526	78590

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
22-Apr-25		16604	14639	1965
23-Apr-25		17857	13890	3967
24-Apr-25		21177	15752	5426
25-Apr-25		18713	13673	5040
28-Apr-25		11684	9174	2510
Month to date- Apr		251004	242797	8208
FII (Prov.) (Rs Cr)		Buy	Sell	Net
23-Apr-25		17507	14174	3333
24-Apr-25		24089	15839	8251
25-Apr-25		15524	12572	2952
28-Apr-25		11680	9206	2474
29-Apr-25		15674	13289	2386
Month to date-Apr		274777	272092	2684
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
23-Apr-25		15151	16385	(1234)
24-Apr-25		13452	13987	(535)
25-Apr-25		16171	12631	3540
28-Apr-25		14436	11619	2818
29-Apr-25		13356	11987	1369
Month to date-Apr		258934	232498	26436
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
22-Apr-25		1924	2609	(685)
23-Apr-25		907	2986	(2079)
24-Apr-25		1520	1416	104
25-Apr-25		1960	2852	(893)
28-Apr-25		1354	4265	(2911)
Month to date- Apr		47080	74593	(27513)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1767	44%	1325	45%
Decline	2168	53%	1517	52%
Unchanged	119	3%	75	3%

Market Turnover	29-Apr	28-Apr	Var (%)
BSE Cash	7562	5643	34%
NSE Cash	102697	90099	14%
NSE Futures	104676	119608	-12%
NSE Options	14392078	13485854	7%
Total (Rs.Cr)	14607013	13701203	7%

Volatility Index	29-Apr	28-Apr
Volatility Index	17.37	16.94

Index PE - TTM	29-Apr	Yr. High	Yr. Low
Sensex	22.4	25.2	20.3
Nifty	21.9	24.4	19.6

### Corporate News

#### Prestige Group enters NCR market with ₹9,000 Cr residential project 'The Prestige City – Indirapuram'

Prestige Estates Projects Limited has made its official debut in the National Capital Region (NCR) residential market with the launch of its flagship project, The Prestige City – Indirapuram. The company announced that it has received all necessary approvals from the Real Estate Regulatory Authority (RERA) and has launched the first phase of the project. (NDTV)

#### BEML launches India's largest indigenously developed electric rope shovel

Bengaluru-headquartered BEML Limited, a Public Sector Undertaking, on Tuesday announced the launch of the country's largest indigenously designed and developed electric rope shovel-BRS21. Describing it as a technological marvel, BEML said the BRS21 rope shovel is entirely designed, engineered, and manufactured in India. (ET)

#### Vedanta unveils technology to create a productive, future-ready workplace

On Tuesday Vedanta Ltd implemented modern technological systems with AI-powered monitoring systems as well as drones and VR simulators for workplace safety and operation efficiency improvement. (ET).

### Economy

#### MoF flags global uncertainty as risk to India's FY26 growth

The finance ministry on Tuesday said global uncertainties pose a key risk to the country's FY26 growth outlook. More than trade, the "perception of prolonged uncertainty may cause the private sector to put its capital formation plans on hold", the ministry said in its monthly economic report for March. (ET)

#### Maharashtra, Gujarat, Karnataka lead in new state rankings; Goa tops smaller states list

Maharashtra, Gujarat, and Karnataka are India's top three states based on a study of 50 indicators spread across seven parameters: economic, fiscal, infrastructure, financial development, social, governance, and environment. (ET)

### International

#### Germany's Merck KGaA in \$3.9 billion deal to buy US biotech firm Spring Works

Germany's Merck KGaA has struck a deal to buy U.S. biotech company SpringWorks Therapeutics for an equity value of \$3.9 billion to add rare cancer therapies ahead of expected revenue losses linked to expiring patents. (Invst)

Top 5 Nifty Gainers	29-Apr	28-Apr	Var(%)
BEL	317	305	4.0%
TRENT	5392	5210	3.5%
TECHM	1495	1462	2.3%
RELIANCE	1400	1369	2.3%
ETERNAL	231	227	1.7%
Top 5 Nifty Losers	29-Apr	28-Apr	Var(%)
COALINDIA	389	397	-2.0%
ULTRACEMCO	11869	12114	-2.0%
ONGC	246	251	-2.0%
SUNPHARMA	1806	1842	-2.0%
DRREDDY	1176	1199	-1.9%

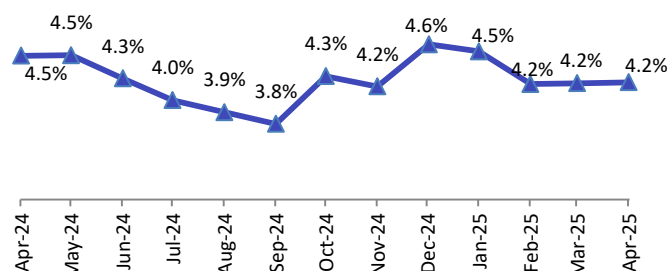
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	80288	0.1%	0.9%	3.7%	7.8%
MIDCAP	43194	0.2%	-0.1%	4.0%	2.5%
SMLCAP	48239	0.1%	-1.8%	3.4%	2.0%
AUTO	49931	-0.3%	1.8%	4.7%	-2.2%
BANKEK	62982	-0.3%	-1.3%	5.8%	12.5%
Capital Goods	63290	0.9%	1.8%	0.9%	0.4%
FMCG	20519	-0.3%	-1.3%	5.5%	4.6%
Health Care	42212	-0.8%	-0.2%	1.9%	19.2%
IT	35243	1.1%	5.2%	-2.4%	3.4%
METAL	29170	-1.0%	-0.3%	-5.4%	-6.7%
Oil & Gas	26490	0.0%	0.9%	5.4%	-8.6%
Power	6708	-0.7%	-1.8%	1.8%	-7.1%
Realty	6743	-0.2%	-1.7%	2.1%	-11.8%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	69679	0.0%	1.6%	2.4%	-10.7%
Fresh Exposure	4510	0.0%	-24.7%	-2.8%	-2.1%
Exposure liquidated	5387	0.0%	6.7%	47.0%	27.5%
Closing Net scripwise outstanding	68801	0.0%	-1.0%	-0.3%	-12.3%

NSE USD Futures	29-Apr	28-Apr	Var (%)
Apr Expiry (Rs./\$)	87.25	85.19	2.4%
May Expiry (Rs./\$)	87.00	87.25	-0.3%
Total Turnover (Rs. Crore)	2227	8399	-73%

Sectors	TTM PE
Auto	29.42
Auto Ancillary	40.39
Banking	13.93
Engineering	50.09
Cement	74.56
Diamonds & Jewellery	41.7
Housing Finance	24.78
Infrastructure & Const	27.87
Metals-Aluminium	25.58
Metal – Steel	16.91
Oil Expl.	7.51
Pharma	9.27
Power – Gen. Supp.	38.94
Information Tech.	28.62
Sugar	18.97
Telecom Serv. Prov.	46.86
Tyres	29.32

## US 10-Year Bond Yield (Source: Investing.com)



10 year G-Sec Yield	Current	Previous	Change
US	4.17%	4.17%	(0) bps
Japan	1.32%	1.32%	0 bps
India	6.34%	6.40%	(5) bps
UK	4.48%	4.51%	(3) 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)	747	1043	(296.2)

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	Volume	Previous	Volume	Variance	No. of Share	ADR Price	BSE	Variance
	(US\$)		Day Price		(%)	Per ADR	(Rs.)	Price	(%)
Infosys Tech	17.57	7769596	17.33	7546899	1.38%	1	1497.93	1497.50	0.0%
Wipro	2.87	5895468	2.84	7239458	1.06%	1	244.68	241.40	1.4%
Dr.Reddy's	13.94	1712831	13.94	1336607	0.00%	1	1188.45	1176.00	1.1%
ICICI Bank	33.78	4637133	33.52	3564261	0.78%	2	1439.96	1429.80	0.7%
HDFC Bank	72.43	2099283	71.84	1764229	0.82%	3	2058.34	1908.80	7.8%

GDR's (US\$)				
	Prices	Prev. Close	Change	Var %
L&T	39.05	39.00	0.0	0.1%
RIL	65.30	63.40	1.9	3.0%
SBI	95.40	95.40	0.0	0.0%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.40%	2.80%
Unemployment (%)	4.20%	4.10%

Interest Rate (%)	Current	Previous
Fed Rate	4.50%	4.50%

US GDP	Q4CY24	Q3CY24
Growth (QoQ Annualized)	2.40%	3.10%

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	30 Apr
US Unemployment Data	02 May
US Fed Rate	07 May
China GDP	15 Jul
China Inflation Data	10 May

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**Bulk Deal As On 29/04/25**

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
543211	BONLON	SYLPH TECHNOLOGIES LIMITED	S	95185	38.25
543211	BONLON	SYLPH TECHNOLOGIES LIMITED	B	112185	37.38
539091	CITL	LALIT MADHUKAR	S	2442359	1.54
543594	DPL	BAGESHRI SANTOSH KANITKAR	B	150000	20.87
543594	DPL	NIGHTINGALE GROWTH	B	150000	21.47
512441	ENBETRD	DEVARAJBACKIARAJ	B	5390000	0.8
512441	ENBETRD	DEVEN .	B	5680000	0.8
512441	ENBETRD	JNSP TRADING LLP	S	7911840	0.76
512441	ENBETRD	JNSP TRADING LLP	B	611840	0.75
512441	ENBETRD	TEUDDY TECHNOLOGY PRIVATE LIMITED	S	7474215	0.8
512441	ENBETRD	TEUDDY TECHNOLOGY PRIVATE LIMITED	B	17889439	0.74
537707	ETT	JAYESH AMRATLAL SHAH	B	300500	16.76
521137	EUREKAI	ANKITKUMAR PRAVINCHANDRA MEHTA	B	65000	9.86
521137	EUREKAI	CHARUBEN MAHENDRABHAI SHETH	B	46000	9.91
521137	EUREKAI	SHIVAM	S	81363	9.85
544108	GPSL	L7 HITECH PRIVATE LIMITED	B	30000	173.31
532015	GRAVITY	GROWNOURISH TRADING PRIVATE LIMITED	B	200000	4.6
532015	GRAVITY	SAMIR RASIKLAL THAKKAR	S	88368	4.55
532015	GRAVITY	SHRADDHA VARUN THAKKAR	S	99990	4.65
505336	HARSHILAGR	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	5000000	2.71
505336	HARSHILAGR	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	1288640	2.71
505336	HARSHILAGR	NEO APEX VENTURE LLP	B	15000000	2.71
505336	HARSHILAGR	SETU SECURITIES PVT. LTD.	S	4500000	2.71
505336	HARSHILAGR	SETU SECURITIES PVT. LTD.	B	610	2.71
505336	HARSHILAGR	UMA SHANKAR EXIM PRIVATE LIMITED	B	7643551	2.73
526967	HEERAISP	HELLY DIVYANG SHAH	B	31496	9.08
539449	IGCIL	GAJANAND JASHVANTBHAI TAILOR (HUF)	S	849228	5.55
524614	INDXTRA	AMBASSADOR INTRA HOLDINGS LTD.	B	5885000	4.4
524614	INDXTRA	KESHA PARAS MEHTA	S	1123596	4.4
524614	INDXTRA	SMITJIGNESHKUMARSHAH	S	747191	4.4
544160	JAYKAILASH	NEEL NARENDRABHAI PUJARA	S	25600	56.1
538834	JMJFIN	COMFORT ADVERTISING PVT LTD	B	71693	27.3
538834	JMJFIN	SANDARV TRADING PRIVATE LIMITED	S	71693	27.3
531778	KACHCHH	PHARMACHECK IMPEX PRIVATE LIMITED	S	31096	40.8
532397	KONNDOR	JIMITKUMAR DILIPKUMAR SANGHVI	B	36000	12.35
532397	KONNDOR	RIYA VINIT AGRAWAL	S	29252	12.35
540360	LLFICL	MINERVA VENTURES FUND	S	5098886	6.36
514060	MARKOBENZ	RAKESH RAMESHBHAI PATEL HUF	B	138832	10.84
526251	MIDEASTP	KISHOR AMICHAND SHAH	S	27000	19.75
543207	NATURAL	HETAL ARUNKUMAR PRAJAPATI	B	227525	10.89
530253	RAJTUBE	KALISHANKAR INDUSTRIES PRIVATE LIMITED	S	36500	276
530253	RAJTUBE	MAHEVARSH FINCON PRIVATE LIMITED	B	35990	276
512297	SHANTAI	VARAPRASAD NANDARAPU	B	8160	73.49
543970	SHOORA	RIKHAV SECURITIES LIMITED	B	9000	82.09
539584	SIPTL	GAUTAM RAJ	S	57600000	0.57
539584	SIPTL	SAKET KUMAR	S	432021	0.57
539584	SIPTL	SAKET KUMAR	B	38049821	0.57
539584	SIPTL	SETU SECURITIES PVT. LTD.	S	1669402	0.57
539584	SIPTL	SETU SECURITIES PVT. LTD.	B	12519402	0.57
542146	SKIFL	CHHAYA GAURANG SHAH	S	200000	55

542146	SKIFL	MARKET-HUB STOCK BROKING PRIVATE LIMITED	B	60000	55
542146	SKIFL	PASHUPATI CAPITAL SERVICE PVT LTD	B	102500	54.88
532070	SUMUKA	TRADE CORNER	B	53000	190
531499	SYBLY	VISAGAR FINANCIAL SERVICES LIMITED	S	100000	5.8
544028	TATATECH	IRAGE BROKING SERVICES LLP	S	2721121	674.73
544028	TATATECH	IRAGE BROKING SERVICES LLP	B	180734	670.49
531190	TAVERNIER	SHAIENDRA HARESHRAY MAJMUNDAR	B	48600	56.43
531190	TAVERNIER	SILVERSTONE CONSULTANCY SERVICES PRIVATE LIMITED	S	100000	56.43
544186	TOTEM	FORBES CAMPBELL FINANCE LIMITED	B	1433087	203.2
544186	TOTEM	SHAPOORJI PALLONJI & CO LTD	S	1470000	203.2
540570	VARIMAN	BRIDGE INDIA FUND	B	1080000	8.85
540570	VARIMAN	ERISKA INVESTMENT FUND LTD	S	1740133	8.86
542803	VEL	NIKHIL KUMAR GUPTA	S	70411	13

NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
OLIL	Oneclick Logistics Ind L	BHASKAR NARMADASHANKAR OZA	BUY	24000	177.41
ONYX	Onyx Biotech Limited	ACINTYO INVESTMENT FUND PCC- CELL 1	SELL	264000	53.19
RAPIDFLEET	Rapid Fleet Mgt Service L	ZETA GLOBAL FUNDS (OEIC) PCC LIMITED - ZETA SERIES B FUND PC	SELL	46200	211.46
RVTH	Revathi Equipment India L	SHAH SHARAD KANAYALAL	BUY	27597	890.14
SAMHI	Samhi Hotels Limited	BLUE CHANDRA PTE LTD	SELL	8721414	174.3
SAMHI	Samhi Hotels Limited	BLUE CHANDRA PTE LTD	SELL	8721414	174.3
SAMHI	Samhi Hotels Limited	BOFA SECURITIES EUROPE SA	BUY	574123	174.3
SAMHI	Samhi Hotels Limited	BOFA SECURITIES EUROPE SA - ODI	BUY	917958	174.3
SAMHI	Samhi Hotels Limited	CBJ AS TRUSTEE FOR SMBCTB EMERGING MARKETS IMPACT MF	BUY	51408	174.3
SAMHI	Samhi Hotels Limited	CITIGROUP GLOBAL MARKETS MAURITIUS PVT LTD	BUY	574121	174.3
SAMHI	Samhi Hotels Limited	LGT SELECT FUNDS-LGT SELECT EQUITY EMERGING MARKETS	BUY	195046	174.3
SAMHI	Samhi Hotels Limited	STEINBERG INDIA EMERGING OPPORTUNITIES FUND LIMITED	BUY	2817623	174.3
SAMHI	Samhi Hotels Limited	STEINBERG INDIA EMERGING OPPORTUNITIES FUND LIMITED	BUY	2817623	174.3
SAMHI	Samhi Hotels Limited	TATA MUTUAL FUND	BUY	2817893	174.3
SAMHI	Samhi Hotels Limited	TATA MUTUAL FUND	BUY	2817893	174.3
SAMHI	Samhi Hotels Limited	TT EM EX CHINA EQUITY FUND	BUY	40412	174.3
SAMHI	Samhi Hotels Limited	TT EMERGING MARKETS UNCONSTRAINED FUND	BUY	549165	174.3
SAMHI	Samhi Hotels Limited	TT HORIZON OPPORTUNITIES FUND LIMITED	BUY	165419	174.3
SAMHI	Samhi Hotels Limited	TT SUSTAINABLE EM EQUITY FUND	BUY	18246	174.3
SHANTI	Shanti Overseas (Ind) Ltd	SUMITKUMAR JAGDISHCHANDRA THAKKAR	BUY	100000	14.7
TATATECH	Tata Technologies Limited	TPG RISE CLIMATE SF PTE . LTD .	SELL	15863806	673.26
THESL	Thinking Hats Enter Sol L	GIRIJADHAVA VYAPAAR PRIVATE LIMITED	BUY	96000	28.89
THESL	Thinking Hats Enter Sol L	MADHU V JHAVER	SELL	99000	28.9

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