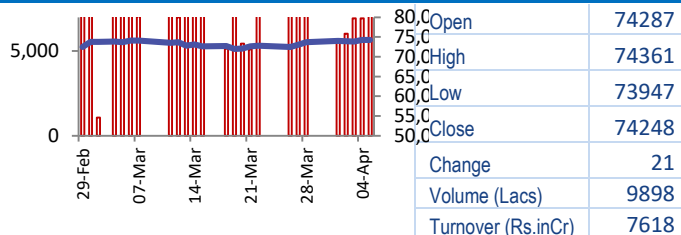
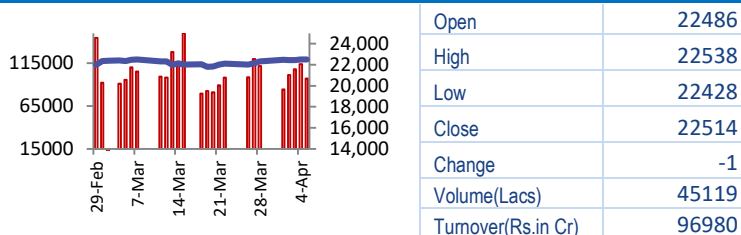


BSE



NSE



World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	38904	38597	307	0.8%
Dow Futures	39246	39223	23	0.1%
Nasdaq	16249	16049	200	1.2%
FTSE	7911	7976	(65)	-0.8%
Nikkei	39518	38992	526	1.3%
Hang Seng	16856	16724	132	0.8%
Gift Nifty	22657	22674	(18)	-0.1%
Straits Singapore	3219	3218	1	0.0%
South Korea	2720	2714	6	0.2%
Taiwan	20467	20338	129	0.6%
Shanghai	3072	3069	3	0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9363	9330	33.0	0.4%
Alumin (\$/MT)	2465	2451	14.0	0.6%
Zinc (\$/MT)	2610	2639	(29.0)	-1.1%
Brent Crude (\$/bbl)	90.0	91.0	(1.0)	-1.1%
Gold (\$/Ounce)	2345	2330	15.0	0.6%
Silver (\$/Ounce)	28.0	27.0	1.0	3.7%
Light Crude (\$/bbl)	86.0	87.0	(1.0)	-1.1%
N G (\$/mmbtu)	2.0	2.0	0.0	0.0%
Sugar (\$/MT)	621.0	625.0	(4.0)	-0.6%
Rubber (Rs./kg)	185.0	185.0	0.0	0.0%
Baltic Dry Index	1628	1669	(41.0)	-2.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.29	83.45	-0.19%
Rs./ Euro	90.28	90.60	-0.35%
Rs./Chinese Yuan	11.58	11.55	0.26%
Yen /\$ rate	151.75	151.62	0.09%
\$ US/Euro	1.08	1.08	0.00%

Dollar Index	Current	Previous	Var(%)
Dollar Index	104.27	104.30	-0.03%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22440	48400
Support 2	22330	48140
Resistance	22600	49000

Securities in Ban For Trade	
HINDCOPPER	SAIL
ZEEL	BANDHANBNK

Market Review

US: U.S. stocks ended the week on a higher note after a blowout jobs report signalled the US economy will continue to power Corporate America.

Asia: Asian stocks were a mixed bag on Monday as Japanese markets rebounded from sharp losses seen last week, while Chinese stocks fell amid renewed concerns over the country's property market.

India: Benchmark indices were listless on Friday after the RBI kept repo rate unchanged at 6.5% for a seventh straight policy. It also maintained the GDP and CPI inflation forecast for FY25.

Markets are expected to open on a flattish note and likely to witness sideways move during the day.

Global Economy: Japan's current account extended its surplus to a 13th straight month in February, thanks to the trade deficit narrowing from the previous month. The surplus rose to 2.64 trillion yen (\$17.41 billion) last month, but was below the median forecast for 3.11 trillion yen in a Reuters poll. It followed a 457 billion yen surplus in January and was the highest since October last year. A breakdown of the data showed exports expanded by 5.5% year-on-year in February, driven by demand for cars, car parts and plastics. Imports grew by 1.4%, the first increase in 11 months, reflecting stronger demand for clothing, computer equipment and petroleum products.

China's central bank will set up a 500 billion yuan (\$70 billion) re-lending programme to support the country's science and technology sectors. The programme will offer loans via 21 banks to small and midsize technology companies at an interest rate of 1.75%. The one-year loans can be extended twice, for up to a year each time. China's policymakers look to boost liquidity and increase confidence in the world's second-biggest economy amid headwinds from a property crisis and frictions with major trading partners.

Commodities: Gold prices slipped more than 1% on Monday as the dollar and Treasury yields held firm after strong U.S. data heightened doubts on whether the Federal Reserve would deliver three interest rate cuts this year.

Oil prices fell nearly 2% as Middle East tensions eased after Israel withdrew more soldiers from southern Gaza.

Currency The dollar firmed as investors weighed when the U.S. Federal Reserve will start cutting rates in the wake of yet another blowout jobs report. EUR/USD edges lower on Monday as the upbeat US NFP continues to underpin the USD. A positive risk tone might cap the safe-haven buck and lend some support to the major.

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	34618	2930	36180	3150	(220)	240202	22071	238952	22136	1250	(65)
Index Option	14528572	1236351	14399526	1224969	11382	3968968	349223	2159976	196088	1808992	153135
Stock Future	206675	17297	269773	22411	(5114)	3157471	261398	3131491	258985	25980	2413
Stock Option	388779	34447	396760	35194	(747)	286230	24903	261715	22834	24515	2069
Total	15158644	1291025	15102239	1285724	5301	7652871	657595	5792134	500043	1860737	157552

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
28-Mar-24	19965	15922	4043
1-Apr-24	39848	37493	2355
2-Apr-24	14908	15355	(447)
3-Apr-24	14852	16107	(1255)
4-Apr-24	14012	14990	(978)
Month to date-Apr	83620	83944	(325)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
1-Apr-24	8818	9340	(522)
2-Apr-24	13279	14902	(1623)
3-Apr-24	13813	16026	(2214)
4-Apr-24	13479	14615	(1136)
5-Apr-24	12835	11175	1659
Month to date-Apr	62223	66059	(3836)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
1-Apr-24	10193	8985	1208
2-Apr-24	12163	10211	1953
3-Apr-24	13037	11935	1102
4-Apr-24	12219	13112	(893)
5-Apr-24	9462	12833	(3370)
Month to date-Apr	57075	57075	0
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
28-Mar-24	3517	2076	1441
1-Apr-24	5992	1269	4723
2-Apr-24	2628	1633	994
3-Apr-24	2147	5801	(3654)
4-Apr-24	1741	2590	(849)
Month to date-Apr	12508	11293	1215

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2394	61%	1530	58%
Decline	1460	37%	1031	39%
Unchanged	94	2%	85	3%

Market Turnover	05-Apr	04-Apr	Var (%)
BSE Cash	7618	6942	10%
NSE Cash	96980	113885	-15%
NSE Futures	117942	163030	-28%
NSE Options	12643811	56159944	-77%
Total (Rs.Cr)	12866351	56443801	-77%

Volatility Index	05-Apr	04-Apr
Volatility Index	11.34	11.22

Index PE - TTM	05-Apr	Yr. High	Yr. Low
Sensex	25.4	26.0	22.2
Nifty	23.1	28.8	20.3

Corporate News

Tata Steel sales rises 6% to 20 MT in FY24; production up 4%

Tata Steel India reported a 6% growth in deliveries to 19.90 MT in FY24, driven by increased demand from retail, automotive, and railway segments. Automotive and special products segment deliveries increased by 8 per cent in FY24 to 2.9 MT, surpassing the previous record in FY23. Branded products and retail segment deliveries increased by 11 per cent in FY24 to 6.5 MT. The industrial products & projects segment deliveries rose 6 per cent to 7.7 MT. (ET)

IRDAI raises concern over Hinduja Group-led IHL bid for Reliance Capital

IRDAI raises concerns over IHL resolution plan for Reliance Capital, citing deviations from insurance regulations. Questions arise over IHL's equity infusion, debt-raising plans, and ability to meet future capital needs. The regulator also seeks clarity on FDI limits and acquisition structure. IHL's Rs 9,650-cr resolution plan for RILCapital was approved by NCLT in February 2024. (ET)

Adani to invest Rs 2.3 tn in renewable energy

Adani Green Energy will invest about Rs 1.5 tn in expanding capacity to generate electricity from solar energy and wind power at Khavda in Gujarat's Kutch to 30 GW from 2 GW currently and another Rs 50,000 cr in 6-7 GW of similar projects elsewhere in the country. Adani New Industries will invest close to Rs 30,000 cr in expanding solar cell and wind turbine manufacturing capacity at Mundra in Gujarat. (BS)

Economy

India secures second overseas port: Sittwe agreement approved by MEA

After Chabahar, India has gained the rights to operate a second overseas port, Sittwe, in Myanmar. MEA has approved a proposal for India Ports Global to take over the operations of the entire port located on the Kaladan River. IPGL is a company 100 per cent owned by the Ministry of Ports, Shipping and Waterways. (BS)

International

Butler Industries joins Onepoint in Atos rescue consortium

Paris-based Butler Industries is joining a consortium to rescue distressed IT consulting firm Atos. Onepoint, which holds 11.4% of Atos, was ready to invest and organise the group's capital restructuring to protect the integrity of its assets after Airbus pulled the plug on a deal to buy the ailing company's cybersecurity assets. The consortium's ambition is "to make Atos the European platform for digital, cybersecurity and artificial intelligence, and the leading European cloud operator". (Reuters)

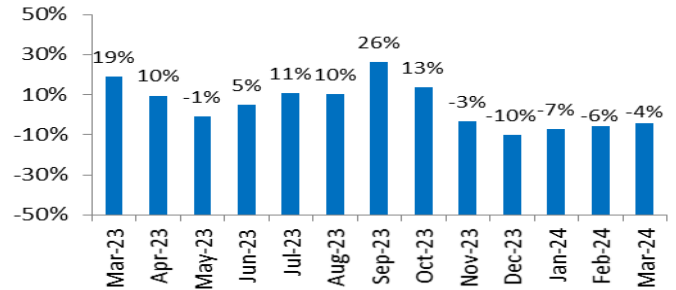
Top 5 Nifty Gainers	05-Apr	04-Apr	Var(%)
KOTAKBANK	1785	1749	2.1%
SBILIFE	1485	1464	1.5%
HDFCBANK	1550	1528	1.4%
BAJAJFINSV	1678	1656	1.3%
ITC	428	423	1.1%
Top 5 Nifty Losers	05-Apr	04-Apr	Var(%)
ULTRACEMCO	9824	10005	-1.8%
GRASIM	2238	2278	-1.8%
BAJAJ-AUTO	9010	9146	-1.5%
BAJFINANCE	7176	7283	-1.5%
LT	3743	3798	-1.4%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	74228	0.5%	1.7%	0.7%	24.4%
MIDCAP	40625	-0.1%	4.0%	1.7%	68.0%
SMLCAP	45804	0.5%	6.5%	1.3%	66.4%
AUTO	49480	0.3%	1.9%	2.2%	73.7%
BANKEX	54140	0.6%	2.0%	0.2%	16.6%
Capital Goods	62605	0.2%	4.3%	6.1%	77.8%
FMCG	19323	-0.3%	0.7%	0.0%	16.0%
Health Care	35503	0.1%	2.5%	2.3%	61.0%
IT	36224	0.9%	2.2%	-3.1%	26.2%
METAL	29567	0.1%	6.0%	4.3%	52.9%
Oil & Gas	27875	-1.6%	1.7%	-4.1%	61.5%
Power	7008	0.4%	6.3%	2.3%	96.4%
Realty	7285	-0.2%	3.0%	-0.8%	131.7%

NSE USD Futures	05-Apr	04-Apr	Var (%)
April Expiry (Rs./\$)	83.42	83.44	0.0%
May Expiry (Rs./\$)	83.34	83.47	-0.2%
Total Turnover (Rs. Crore)	4065	21319	-81%

Sectors	TTM PE
Auto	32.2
Auto Ancillary	44.5
Banking	15.87
Engineering	39.81
Cement	83.26
Diamonds & Jewellery	42.3
Housing Finance	19.81
Infrastructure & Const	32.43
Metals-Aluminium	42.96
Metal - Steel	16.75
Oil Expl.	17.66
Pharma	12.67
Power – Gen. Supp.	46.76
Information Tech.	20.53
Sugar	13.51
Telecom Serv. Prov.	82.48
Tyres	26.18

Ashok Leyland Monthly Volume Growth (YoY) (Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.42%	4.40%	2 bps
Japan	0.78%	0.79%	(1) bps
India	7.12%	7.09%	3 bps
UK	4.07%	4.02%	5 bps
Libor 3 Mths	5.56%	5.56%	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)	1469	1446	23.6

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 05/04/24

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
512149	AVANCE	ADAN TRADERS LLP	S	64802840	1.33
512149	AVANCE	SAHASTRAA ADVISORS PRIVATE LIMITED	B	15000000	1.33
512149	AVANCE	TOPGAIN FINANCE PRIVATE LIMITED	B	10000000	1.34
543439	BRANDBUCKT	DEV GANPAT PAWAR	S	160000	13.44
532834	CAMLINFINE	ANFIMA NV	B	2300000	97.99
532834	CAMLINFINE	ANFIMA NV	B	2300000	97.99
532834	CAMLINFINE	ASHISH SUBHASH DANDEKAR	S	2300000	97.99
532834	CAMLINFINE	ASHISH SUBHASH DANDEKAR	S	2300000	97.99
512379	CRESSAN	INTEX COMMOSALES LLP	S	1536410	17.82
512379	CRESSAN	INTEX COMMOSALES LLP	B	2337850	17.85
539596	DELTA	SIKANDER MANN	S	33561	32.58
532042	FRONTCORP	RESHMI R NAIR	B	32750	40.16
532042	FRONTCORP	SHASHANK BHATEJA	S	32804	40.15
544156	GCONNECT	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	24000	40.54
544156	GCONNECT	MILIND MADHANI SECURITIES PRIVATE LIMITED	S	24000	40.52
544156	GCONNECT	STEPTRADE REVOLUTION FUND	B	81000	40.59
531137	GEMSI	YASHRAMESHBRAHMBHATT	B	427230	1.87
542918	GIANLIFE	ARUN KUMAR GUPTA	S	140732	21.4
542918	GIANLIFE	SHIELD MULTISTATE COOPERATIVE CREDIT SOCIETY LIMITED	B	140000	21.4
513337	GUJTIRM	DHRUV PRADIPKUMAR SHAH	S	700000	44.89
513337	GUJTIRM	NIKHIL RAJESH SINGH	S	592117	45.14
513337	GUJTIRM	NIKHIL RAJESH SINGH	B	621473	44.9
532467	HAZOR	MAA VAISHNO VENTURE	S	100000	367.5
532467	HAZOR	MEENAKSHI .	B	100000	367.5
540134	IISL	FAISALSHAIKH	B	50607	5.29
517423	INTEGSW	GREEN PEAKS ENTERPRISES LLP	S	15000	101.71
505523	MAHACORP	ANKIT MAHENDRABHAI PARLESHA	S	19142985	1.09
531515	MAHANIN	CHARTERED HOLDINGS INDIA PRIVATE LIMITED	S	240147	2.84
539762	MEAPL	BEELINE MERCHANT BANKING PRIVATE LIMITED	B	25401	103.89
523144	MEDICAPQ	DHEERAJ KUMAR LOHIA	B	79371	50.03
523144	MEDICAPQ	GOPAL KRISHNA MAHESHWARI	S	86519	50.48
531832	NAGTECH	BHAVANI NADIMPALLI	S	52990	10.49
543537	SCARNOSE	NARESHBHAI KHETAJI PURABIA	S	34000	167.74
543537	SCARNOSE	PRANITH REALITIES LLP	B	16000	163
530433	SHIVAAGRO	RAJESH MADHAVAN UNNI(HUF)	S	62803	54.7
505515	SHYMINV	PARESH DHIRAJLAL SHAH	S	49000	13.66
531370	SPAR	PRAKASH SHAH	S	48093	19.95
531982	SPECFOOD	KIFS ENTERPRISE	B	63090	40.87
511447	SYLPH	ARPNA DINESH LODHA	B	969326	3.13
531652	THIRDFIN	BHADRESH SHASHIKANT DOSHI	S	15000	97.41
531652	THIRDFIN	IRFAN FAKHRI KARIMI	B	30000	97.41
531652	THIRDFIN	JAYESHKUMAR CHAMPAKLAL SANGHVI	S	25000	97.41
531652	THIRDFIN	KENIL KALPESH SANGHVI	S	20000	97.41
531652	THIRDFIN	MADHAVI KALPESH SANGHVI	S	25500	97.41
531652	THIRDFIN	PRAGNA JAYESHKUMAR SANGHVI	S	20450	97.41
531652	THIRDFIN	SAROJ BHARATKUMAR DAVDA	B	21000	97.41
531652	THIRDFIN	SYKES AND RAY EQUITIES (INDIA) LIMITED	S	15327	97.41
531652	THIRDFIN	URVI GOSALIA	S	15000	97.41
531652	THIRDFIN	VIJAY RAMLALL VATS	B	18000	97.24

531652	THIRDFIN	XTENDED BUSINESS REPORTING LIMITED	B	15998	97.41
531652	THIRDFIN	ZULIA ZAFAR	B	13974	97.41
543623	VEDANTASSET	NANCY PIYUSH AGARWALA	B	18000	43.67
530151	VIJAYTX	BHARATHI ALLURI	S	100000	17.9
530151	VIJAYTX	SAHADEVA RAJU ALLURI	S	270000	17.49
530057	VIVANZA	ARDENT VENTURES LLP	S	2214799	8.19
530057	VIVANZA	MOORTHY SARAVANAN	B	397120	8.27
530057	VIVANZA	TANYA ESTATES PRIVATE LIMITED .	S	450000	8.15

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ASPIRE	Aspire & Innovative Adv L	HEM FINLEASE PVT LTD	BUY	354000	60
BLBLIMITED	BLB Limited	SETU SECURITIES PVT LTD	BUY	490000	25.2
BLUEPEBBLE	Blue Pebble Limited	MULTIPLIER SHARE & STOCK ADVISORS PRVATE LIMITED	SELL	20800	230.3
GSTL	Globesecure Techno Ltd	CHARMI NAYANBHAI PATEL	SELL	99000	50.35
NAMAN	Naman In-Store (India) L	VINEY EQUITY MARKET LLP	BUY	100800	111.8
OMFURN	Omfurn India Limited	GRETEX SHARE BROKING LIMITED	BUY	64800	78.75
OMFURN	Omfurn India Limited	KAUL VINEET SOMNATH	BUY	199200	76
OMFURN	Omfurn India Limited	PROGNOSIS SECURITIES PVT. LTD	SELL	62400	76
OMFURN	Omfurn India Limited	SHRUTI JAY SHAH	SELL	67200	76.12
RILINFRA	Rachana Infra Ltd	ALKABEN PRADIPKUMAR SHAH	SELL	100000	41.08
RADIOWALLA	Radiowalla Network Ltd	MOUNTAIN VENTURES	BUY	40000	126.15
RADIOWALLA	Radiowalla Network Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRVATE LIMITED	BUY	64000	123.15
RADIOWALLA	Radiowalla Network Ltd	SETU SECURITIES PVT LTD	BUY	40000	126.15
RHL	Robust Hotels Limited	WHITEPIN TIE UP LIMITED	SELL	104957	158.96
SECL	Salasar Exterior Cont Ltd	MALANI WEALTH ADVISORS PRIVATE LIMITED	BUY	718750	19.4
SECL	Salasar Exterior Cont Ltd	NIKUNJ ANILKUMAR MITTAL	SELL	1331250	19.4
SECL	Salasar Exterior Cont Ltd	PRAVIN J.DADLIKA	BUY	618750	19.4
SHUBHLAXMI	Shubhlaxmi Jewel Art Ltd	BHAVNA ABHIRAM BHAI NATHWANI	BUY	89000	85.26
SIGNORIA	Signoria Creation Limited	VM PORTFOLIO PRIVATE LIMITED	BUY	30000	191.93
TAC	TAC Infosec Limited	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	BUY	300000	303.63
TAC	TAC Infosec Limited	NG FAMILY TRUST	BUY	100800	290
TARMAT	Tarmat Limited	AEGIS INVESTMENT FUND	BUY	142843	110
TARMAT	Tarmat Limited	MOTISONS SHARES PVT LTD	SELL	215000	110.29
VIJAYA	Vijaya Diagnostic Cen Ltd	CANARA ROBECO MUTUAL FUND A/C - CANARA ROBECO SMALL CAP FUND	SELL	692000	664

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