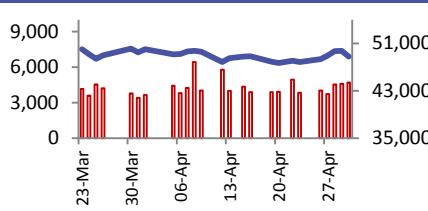
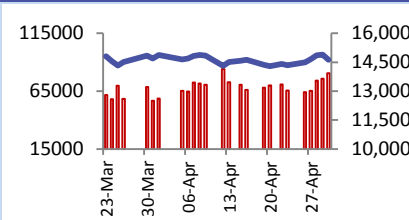


### BSE



Open	49361
High	49569
Low	48698
Close	48782
Change	-984
Volume (Lacs)	4828
Turnover (Rs.inCr)	4694

### NSE



Open	14747
High	14855
Low	14602
Close	14631
Change	-264
Volume(Lacs)	33515
Turnover (Rs.in Cr)	80368

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	33875	34060	-186	-0.5%
Dow Futures	33870	33767	103	0.3%
Nasdaq	13963	14083	-120	-0.9%
FTSE	6970	6961	8	0.1%
Nikkei	28813	29054	-241	-0.8%
Hang Seng	28320	28725	-404	-1.4%
SGX CNX Nifty	14482	14642	-160	-1.1%
Straits Singapore	3172	3218	-47	-1.4%
South Korea	3141	3148	-7	-0.2%
Taiwan	17327	17567	-240	-1.4%
Shanghai	3447	3475	-28	-0.8%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9825	9885	-60.0	-0.6%
Alumin (\$/MT)	2397	2417	-20.0	-0.8%
Zinc (\$/MT)	2926	2919	7.0	0.2%
Brent Crude (\$/bbl)	66.6	66.8	-0.2	-0.3%
Gold (\$/Ounce)	1773	1769	3.7	0.2%
Silver (\$/Ounce)	26.0	25.9	0.0	0.2%
Light Crude (\$/bbl)	63.4	63.6	-0.1	-0.2%
N G (\$/mmbtu)	2.9	2.9	0.0	0.5%
Sugar (\$/MT)	448.4	453.2	-4.8	-1.1%
Rubber (Rs./kg)	166.1	165.0	1.1	0.7%
Baltic Dry Index	3053	3007	46.0	1.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	74.08	74.04	0.05%
Rs./ Euro	89.60	89.73	-0.14%
Rs./Chinese Yuan	11.44	11.44	0.01%
Yen /\$ rate	109.49	109.31	0.16%
\$ US/Euro	1.20	1.20	0.02%

Dollar Index	Current	Previous	Var(%)
Dollar Index	91.30	91.28	0.03%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	14500	32600
Support 2	14370	32200
Resistance	14800	33400

Securities in Ban For Trade	
SUNTV	

### Market Review

**US:** U.S. stocks fell Friday on the last trading day of the month, as one of the busiest weeks of the first quarter earnings reporting season came to a close, with investors weighing blockbuster results from most large technology companies and good economic data, while keeping one eye on expectations that strong data may cause the Federal Reserve to ease back on monetary policy sooner than it expects.

**Asia:** Asian share markets got off to a slow start on Monday as holidays in China and Japan crimped volumes and investors awaited a raft of data this week which should show the U.S. leading a global economic recovery.

**India:** Benchmark indices snapped a four-day gaining streak to end 2% lower on Friday amid sell-off in most sectors, especially banks and financials. Sensex ended at 48,782.36, down 983 points and Nifty ended at 14,631, down 263 points. Pharma sector was the lone gainer among sectors. **Market is expected to open gap down and likely to witness selling pressure during the day.**

**Global Economy:** The United Arab Emirates' economy shrank 6.1% last year, as the coronavirus crisis hit several key sectors. The non-oil economy shrank by 6.2%, it said, with sectors such as accommodation and food services declining by 23.6%, wholesale and retail trade by 13.1% and construction by 10.4%. The economy is expected to grow 2.5% this year.

Australian home prices posted another solid increase in April though the pace of ascent slowed a little as affordability became a bigger problem as houses moved beyond the reach of many buyers. National home prices climbed 1.8% in April, after a 2.8% jump in March that had been the largest gain in 32 years. Prices were up 7.8% on last year, and 6.8% in just the three months to April. Sydney prices raced up 2.4% in April, while Melbourne added 1.3%, Brisbane 1.7% and Perth 0.8%.

**Commodities:** Oil prices climbed on Monday as optimism about a strong rebound in fuel demand in developed countries and China in the second half of the year overshadowed growing concerns of a full lockdown in India to curb the COVID-19 pandemic.

Gold prices ticked up on Monday, supported by a muted dollar ahead of a series of U.S. data, while auto-catalyst metal palladium held firm after surpassing \$3,000 per ounce on concerns over supply shortage in the previous session.

**Currency:** The dollar clung to a recent bounce on Monday as investors made a cautious start to a week crammed with central bank meetings and big-ticket U.S. economic data, looking for clues on the outlook for global inflation and for policymakers' response.

## 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	39755	3742	68416	6705	-2963	105650	10810	94347	9956	11303	854
Index Option	2732194	256198	2690098	251336	4862	784728	80888	586978	62763	197750	18125
Stock Future	204491	15344	194902	14683	661	1291886	94370	1055711	92609	236175	1761
Stock Option	162305	12191	169279	12714	-523	109371	7877	62331	5465	47040	2412
<b>Total</b>	<b>3138745</b>	<b>287475</b>	<b>3122695</b>	<b>285438</b>	<b>2037</b>	<b>2291635</b>	<b>193945</b>	<b>1799367</b>	<b>170793</b>	<b>492268</b>	<b>23152</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
23-Apr-21	6677	7853	(1176)
26-Apr-21	7795	8850	(1055)
27-Apr-21	5777	6886	(1109)
28-Apr-21	7889	6976	913
29-Apr-21	6768	5326	1442
<b>Month to date-Apr</b>	<b>144791</b>	<b>154450</b>	<b>(9659)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
26-Apr-21	7661	8773	(1112)
27-Apr-21	5528	6983	(1455)
28-Apr-21	7823	7057	766
29-Apr-21	6399	5590	809
30-Apr-21	7951	11416	(3465)
<b>Month to date-Apr</b>	<b>140104</b>	<b>152797</b>	<b>(12693)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
26-Apr-21	6518	5495	1023
27-Apr-21	6485	5021	1463
28-Apr-21	6349	5913	436
29-Apr-21	4222	5165	(942)
30-Apr-21	5762	4342	1419
<b>Month to date-Apr</b>	<b>103109</b>	<b>92021</b>	<b>11089</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
23-Apr-21	816	1240	(425)
26-Apr-21	995	866	129
27-Apr-21	416	337	79
28-Apr-21	212	478	(267)
29-Apr-21	141	976	(835)
<b>Month to date-Apr</b>	<b>17615</b>	<b>17732</b>	<b>(118)</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1320	42%	799	40%
Decline	1630	52%	1087	55%
Unchanged	165	5%	105	5%

Market Turnover	30-Apr	29-Apr	Var (%)
BSE Cash	4694	4590	2%
NSE Cash	80368	75807	6%
NSE Futures	108314	194911	-44%
NSE Options	2132379	9749059	-78%
Total (Rs.Cr)	2325754	10024367	-77%

Volatility Index	30-Apr	29-Apr
Volatility Index	23.03	23.31

Index PE – TTM	30-Apr	Yr. High	Yr. Low
Sensex	32.1	36.2	18.6
Nifty	32.2	42.0	20.3

## Corporate News

**Biocon Biologics provided 7,000 doses of Itolizumab in April**

Biocon Biologics, the biosimilar subsidiary of Biocon, provided 7,000 doses of Itolizumab for treatment of Covid-19 patients in April, three times more than last year, and re-aligned its focus to deliver Covid-19 treatment drugs faster, its top executive said. (ET)

**Yes Bank says no to National Asset Reconstruction Company, says will pursue own NPA aggregator**

Yes Bank is breaking ranks with the industry in bad loans resolution as it would not sell any default loans to the newly proposed National Asset Reconstruction Company (NARC) as it believes it would be able to recover more than the proposed bad debt aggregator. (ET)

**Hero MotoCorp reports 35 % dip in sales in April**

Hero MotoCorp has sold 3,72,285 units last month, down by 35 % from 5,76,957 units dispatched in March this year. The company said sales in April were subdued due to the temporary closure of plant operations and the retail outlets across several key territories in India on account of the impact of the second wave of COVID-19. The sales numbers of April 2021 were not comparable with the corresponding month of the previous year (April 2020), since no vehicles were manufactured and dispatched to dealers due to the nationwide lockdown after the outbreak of COVID-19, it added. (ET)

**TCS announces Samir Sekaria as CFO as incumbent 'Ramki' retires today**

TCS named Samir Sekaria as its CFO, effective May 1. He replaces V Ramakrishnan ('Ramki') who will be retiring from the services of the company today (April 30). (BS)

**SpiceJet defers up to 50% salary of most employees in April**

SpiceJet has deferred up to 50 % of the April salary of its employees as a cash crunch and a second wave of Covid-19 pandemic impact its operations. (BS)

**Hyundai Motor India's total sales decline 8% to 59,203 units in April**

Hyundai Motor India Ltd (HMIL) reported total sales of 59,203 units in April 2021, a decline of 8 % from 64,621 units it had sold in March this year. Domestic sales stood at 49,002 units, while exports were at 10,201 units last month (ET)

Top 5 Nifty Gainers	30-Apr	29-Apr	Var(%)
ONGC	108	104	3.9%
COALINDIA	133	128	3.9%
DIVISLAB	4062	3911	3.9%
GRASIM	1402	1351	3.8%
IOC	91	89	2.2%
Top 5 Nifty Losers	30-Apr	29-Apr	Var(%)
HDFC	2420	2539	-4.7%
HDFCBANK	1412	1473	-4.1%
ICICIBANK	601	621	-3.4%
KOTAKBANK	1749	1805	-3.1%
ASIANPAINT	2536	2613	-2.9%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	48,782	-2.0%	1.9%	-2.5%	44.7%
MIDCAP	20,312	-0.7%	1.8%	-1.0%	69.1%
SMLCAP	21,670	-0.1%	3.2%	2.8%	95.2%
AUTO	21,668	-1.4%	0.3%	-4.1%	62.3%
BANKEK	37,305	-2.6%	3.6%	-2.4%	50.9%
Capital Goods	20,252	-0.9%	1.5%	-5.6%	66.2%
FMCG	12,509	-1.0%	-0.1%	-2.8%	16.1%
Health Care	23,531	0.7%	0.9%	9.3%	53.5%
IT	26,306	-0.8%	0.2%	-1.7%	84.8%
METAL	17,822	0.1%	10.3%	17.8%	164.2%
Oil & Gas	14,996	1.3%	3.3%	-0.6%	24.3%
Power	2,481	-0.5%	1.4%	-2.5%	66.5%
Realty	2,468	-0.6%	3.0%	-7.8%	70.2%

NSE USD Futures	30-Apr	29-Apr	Var (%)
May Expiry (Rs./\$)	74.36	74.36	0.0%
June Expiry (Rs./\$)	74.71	74.69	0.0%
Total Turnover (Rs. Crore)	25711	25898	-1%

Sectors	TTM PE
Auto	33.54
Auto Ancillary	80.98
Banking	25.34
Engineering	27.87
Cement	31.27
Diamonds & Jewellery	103.70
Housing Finance	27.90
Infrastructure & Const	33.20
Metals-Aluminium	22.31
Metal – Steel	17.03
Oil Expl.	41.02
Pharma	34.05
Power – Gen. Supp.	24.36
Information Tech.	30.50
Sugar	7.69
Telecom Serv. Prov.	23.61
Tyres	23.28

## Economy News

### Exports jump to \$30.21 bn in April; trade deficit at \$15.24 bn

India's exports in April jumped nearly three-folds to \$30.21 bn from \$10.17 bn in the same month last year, according to commerce ministry's preliminary data released on Sunday. Imports too rose to \$45.45 bn last month as against \$17.09 bn in April 2020. India is thus a net importer in April with a trade deficit of \$15.24 bn, which increased by 120.34% over the trade deficit of \$6.92 bn in April 2020. (Mint)

### India Inc's foreign borrowings jump 24% to \$9.23 bn in March

India Inc's external commercial borrowings jumped by over 24% to \$9.23 bn in March this year, according to RBI data. Indian firms had raised \$7.44 bn from the foreign market in the same period a year ago. Of the total borrowings during March 2021, \$5.35 bn came in through the approval route of the external commercial borrowings (ECB), while the rest of \$3.88 bn was raked in via the automatic route of raising funds from international markets. (ET)

### Core sectors' output up 6.8 pc in March due to base effect; contracts 7 pc in 2020-21

The output of eight core sectors grew by 6.8% in March, the highest in 32 months, driven by base effect-led uptick in production of natural gas, steel, cement and electricity. According to the commerce and industry ministry data, production of natural gas, steel, cement and electricity jumped 12.3%, 23%, 32.5% and 21.6% in March, as against (-) 15.1%, (-) 21.9%, (-) 25.1% and (-) 8.2% in March 2020, respectively. Coal, crude oil, refinery products and fertiliser segments recorded negative growth during the month under review. (FE)

## International Corporate News

### Intel to invest \$600 mn to expand chip, Mobileye R&D in Israel

Intel Corp said on Sunday it will invest another \$600 million in Israel to expand its R&D and confirmed it was spending \$10 billion on a new chip plant. Intel is investing \$400 million to turn its Mobileye unit headquartered in Jerusalem into an R&D campus for developing self-driving car technologies. Another \$200 million will be invested in building an R&D centre, called IDC12, in the northern port city of Haifa next to its current development centre. (Reuters)

### 3M hit with \$6 million punitive damages by U.S. jury in first combat earplug trial

3M Co was found liable on Friday for hearing damage suffered by three U.S. military veterans who accused the company of covering up design defects in its earplugs. The jury awarded each of the plaintiffs \$2.1 million in punitive damages and a total of \$830,500 in compensatory damages for their medical expenses, lost earnings and pain and suffering. (Reuters)

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	18.08	7073469	18.46	6545711	-2.06%	1	1339.34	1354.35	-1.1%
Tata Motors	19.35	1758336	20.10	1075048	-3.73%	5	286.68	293.85	-2.4%
Wipro	7.16	2104972	7.31	924620	-2.05%	1	530.40	492.75	7.6%
Dr.Reddy's	69.02	182488	68.96	96426	0.09%	1	5112.92	5163.10	-1.0%
ICICI Bank	16.30	9204688	16.77	7388905	-2.80%	2	603.74	600.50	0.5%
HDFC Bank	70.28	1875003	73.13	1481835	-3.90%	3	1735.42	1412.30	22.9%

GDR's (US\$)				
	Prices	Prev. Close	Change	Var %
L&T	17.94	18.08	-0.14	-0.8%
RIL	54.10	54.80	-0.70	-1.3%
SBI	46.75	47.70	-0.95	-2.0%

10 year G-Sec Yield	Current	Previous	Change
US	1.63%	1.63%	(1) bps
Japan	0.10%	0.10%	(0) bps
India	6.03%	6.06%	(3) bps
UK	0.84%	0.84%	(0) bps
Libor 3 Mths	0.18%	0.18%	0 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	582	582	0.0%
Inflation – WPI	7.39%	4.17%	322bps
Inflation – CPI	5.52%	5.08 %	44 bps

India GDP	Q3FY21	Q2FY21	FY20
Growth	0.4%	-7.5%	4.2%

Monetary Policy	Current	Previous	Change
Repo Rate	4.00%	4.00%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	3.00%	3.00%	0 bps
O/S Banking System Liquidity (Rs bn)	5878	5739	138

IIP Growth -%	Feb-21	Feb-20	YTD-FY21
IIP	-3.6	1.6	-17.5
Mining	-5.5	3.8	-13.3
Manufacturing	-3.7	1.3	-19.7
Electricity	0.1	0.9	-5.6

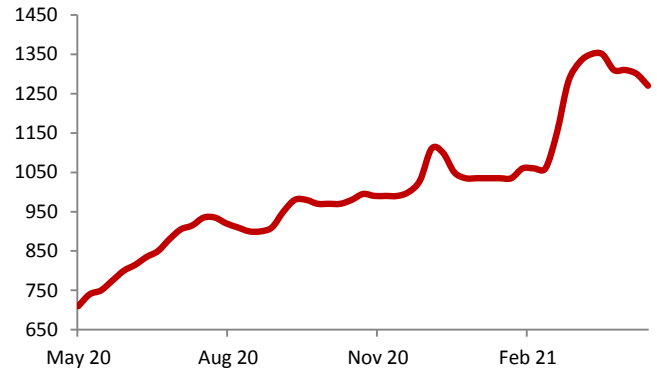
US Economy Data	Current	Previous
Inflation (%) (YoY)	2.60%	1.70%
Unemployment (%)	6.00%	6.20%

Interest Rate (%)	Current	Previous
Fed Rate	0-0.25%	0-0.25%

US GDP	Q4CY20	Q3CY20
Growth (QoQ Annualized)	4.3%	33.4%

China Economy Data	Current	Previous
GDP	18.30%	6.50%
Inflation – CPI (%)	0.40%	-0.20%

HDPE Prices (\$/MT)	(Source: BBG)
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	Date
Indian GDP Data	31 May
Indian Inflation Data CPI	To be announced
Indian Inflation Data WPI	14 May
Indian Monetary Policy	To be announced
India's Industrial Production (IIP)	12 May
US Inflation Data	12 May
US GDP	To be announced
US Unemployment Data	07 May
US Fed Rate	To be announced
China GDP	15 July
China Inflation Data	11 May

Event Update		
Co. Name	Date	Purpose
Quick Heal Technologies Ltd.	03/05/21	Buy Back of Shares
Gateway Distriparks Ltd.	05/05/21	Rs.5.00 per share(50%)First Interim Dividend
Lakshmi Automatic Loom Works Ltd.	05/05/21	Consolidation of Shares from Rs.10/- to Rs.100/-
CRISIL Ltd.	06/05/21	Rs.7.00 per share(700%)Interim Dividend
Allsec Technologies Ltd.	07/05/21	Rs.15.00 per share(150%)Interim Dividend
Aptech Ltd.	07/05/21	Rs.2.25 per share(22.5%)Interim Dividend
Infobeans Technologies Ltd.	07/05/21	Buyback
Global Education Ltd.	08/05/21	Dividend
Prime Fresh Ltd.	08/05/21	Bonus issue
Vaibhav Global Ltd.	10/05/21	Stock Split from Rs.10/- to Rs.2/-
Alkyl Amines Chemicals Ltd.	12/05/21	Stock Split from Rs.5/- to Rs.2/-
Laurus Labs Ltd.	12/05/21	Rs.0.80 per share(40%)Third Interim Dividend
Procter & Gamble Hygiene & Health Care Ltd.	12/05/21	Interim Dividend
Gillette India Ltd.	14/05/21	Interim Dividend
NCL Industries Ltd.	14/05/21	Second Interim Dividend
Cigniti Technologies Ltd.	28/05/21	Rs.2.50 per share(25%)Final Dividend
Infosys Ltd.	01/06/21	Rs.15.00 per share(300%)Final Dividend
KSolves India Ltd.	07/06/21	Bonus
Nippon Life India Asset Management Ltd.	11/06/21	Rs.5.00 per share(50%)Final Dividend
HDFC Life Insurance Co Ltd.	01/07/21	Rs.2.02 per share(20.2%)Final Dividend
Syngene International Ltd.	14/07/21	A.G.M.

## Bulk Deal AS On 30/04/21

BSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
500477	ASHOKLEY	MATTHEWS ASIA SMALL COMPANIES FUND	B	1535185	114
500477	ASHOKLEY	MATTHEWS EMERGING ASIA FUND	S	1535185	114
508136	BNALTD	RAMESH CHIMANLAL SHAH	S	15895	150.94
539876	CROMPTON	MATTHEWS ASIA SMALL COMPANIES FUND	B	720912	377.15
539876	CROMPTON	MATTHEWS EMERGING ASIA FUND	S	720912	377.15
539197	DEVHARI	FESTINO VINCOM LIMITED	S	400000	0.71
531739	GENNEX	REGIUS SUPPLIERS PRIVATE LIMITED	S	761488	6.61
539692	IFINSER	PARAS MAL BOTHRA	B	19652	6.48
514165	INDIANACRY	GURDIAL SINGH RIAR	S	750000	11.78
535387	LAKHOTIA	BHARAT B MISHRA HUF	B	62500	8
535387	LAKHOTIA	VIJAYKUMAR MUKHIYA	S	73901	8
530219	NUTRICIRCLE	VIPUL MOHAN PATEL	B	1400	62.54
539561	REMLIFE	SAURABHMOHNOT	S	21943	50.09
539561	REMLIFE	UPPINANGADYSUDHINDRANAYAK	B	18720	51.04
532939	RPOWER	HOUSING DEVELOPMENT FINANCE CORPORATION LIMITED	S	17124993	5.13
540259	SHANGAR	GOENKA BUSINESS & FINANCE LIMITED	S	103603	13.49
532498	SHRIRAMCIT	MATTHEWS ASIA SMALL COMPANIES FUND	B	172434	1431.1
532498	SHRIRAMCIT	MATTHEWS EMERGING ASIA FUND	S	172434	1431.1
539026	SSPNFIN	ASHOK KUMAR SINGH	B	44000	10.72
539026	SSPNFIN	CHANDER PRAKASH TALWANI	B	28000	10.2
539026	SSPNFIN	ESPS FINSERVE PRIVATE LIMITED	S	44000	10.67
539026	SSPNFIN	PAWAN KANSAL	B	32000	10.25
539026	SSPNFIN	SUBASH RAMASHISH MISHRA	S	64000	10.23
531771	TOWASOK	BHAVINI JAIN	B	25000	5.44
531771	TOWASOK	SHARAD KANAYALAL SHAH	S	42575	5.44
NSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
BCP	B.C. Power Controls Ltd	ASHWIN KAMDAR (HUF)	SELL	363484	3.16
COFFEEDAY	Coffee Day Enterprise Ltd	SETU SECURITIES PVT LTD	BUY	1914925	37.7
FILATEX	Filatex India Ltd	WHEELERS DEVELOPERS PRIVATE LIMITED	BUY	1271716	92.74
PNC	Pritish Nandy Comm. Ltd.	MANSI SHARES & STOCK ADVISORS PVT LTD	BUY	90000	47.25
RCOM	Reliance Comm. Ltd.	HOUSING DEVELOPMENT FINANCE CORPORATION LIMITED	SELL	27500000	1.6
RPOWER	Reliance Power Limited	HOUSING DEVELOPMENT FINANCE CORPORATION LIMITED	SELL	22077935	5.04
SHRENİK	Shrenik Limited	DEV DIP BUILDERS PRIVATE LIMITED	BUY	3804901	1.93
ANDHRSUGAR	The Andhra Sugars Ltd	VIKAS VIJAYKUMAR KHEMANI	BUY	150000	391.54
TOTAL	Total Transport Sys Ltd	SHIFALI MEHTA	SELL	75000	40.95

**Disclosure:**

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