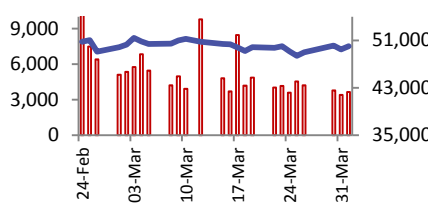
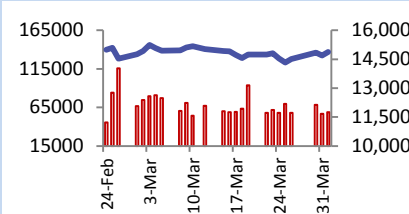


## BSE



Open	49869
High	50092
Low	49479
Close	50030
Change	521
Volume (Lacs)	3653
Turnover (Rs.inCr)	3641

## NSE



Open	14798
High	14883
Low	14692
Close	14867
Change	177
Volume(Lacs)	25467
Turnover (Rs.in Cr)	58765

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	33153	32982	172	0.5%
Dow Futures	33251	33037	214	0.6%
Nasdaq	13480	13247	233	1.8%
FTSE	6737	6714	24	0.4%
Nikkei	30087	29854	233	0.8%
Hang Seng	28939	28939	UNCH	UNCH
SGX CNX Nifty	14900	14993	-93	-0.6%
Straits Singapore	3207	3182	26	0.8%
South Korea	3115	3113	2	0.1%
Taiwan	16571	16571	UNCH	UNCH
Shanghai	3484	3466	18	0.5%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8790	8786	4.5	0.1%
Alumin (\$/MT)	2226	2212	13.5	0.6%
Zinc (\$/MT)	2775	2819	-44.0	-1.6%
Brent Crude (\$/bbl)	64.4	64.9	-0.5	-0.8%
Gold (\$/Ounce)	1725	1729	-3.6	-0.2%
Silver (\$/Ounce)	24.9	25.0	-0.1	-0.4%
Light Crude (\$/bbl)	61.1	61.5	-0.4	-0.7%
N G (\$/mmbtu)	2.6	2.6	0.0	-1.4%
Sugar (\$/MT)	418.7	417.0	1.7	0.4%
Rubber (Rs./kg)	170.0	170.0	0.0	0.0%
Baltic Dry Index	2072	2046	26.0	1.3%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	73.33	73.44	-0.15%
Rs./ Euro	86.38	86.22	0.19%
Rs./Chinese Yuan	11.17	11.19	-0.18%
Yen /\$ rate	110.58	110.69	-0.10%
\$ US/Euro	1.18	1.18	0.08%

Dollar Index	Current	Previous	Var(%)
Dollar Index	92.96	93.02	-0.07%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	14740	33550
Support 2	14630	33100
Resistance	14940	34500

Securities in Ban For Trade	
SAIL	

## Market Review

**US:** all the major indexes closed near their highs of the day. The Nasdaq composite led on the upside as the S&P 500 notched another all-time high Thursday. At the market close, the small-cap Russell 2000 was up 1.5%. Meanwhile, the Nasdaq was up 1.8%, leading the market. The Dow Jones industrials gained 0.5%.

**Asia:** Asian stocks little changed on Monday. Shares in Japan nudged higher while many major Asia-Pacific markets are closed for holidays.

**India:** A tug of war between bulls and bears was ultimately won by the bulls on Thursday, the day of the expiry of the weekly F&O contracts. That apart, buoyancy in the global markets on the back of a \$2 trillion US government spending plan, and record GST collection at Rs 1.24 trillion for the month of March back home gave the requisite armour to investors. Among the frontline indices, the benchmark S&P BSE Sensex reclaimed the 50,000-mark on a closing basis and ended at 50,030. Nifty50 index closed at 14,867 levels, up 177 points or 1.2%. **Market is expected to open gap down and likely to witness profit booking during the day.**

**Global Economy:** The U.S. economy created the most jobs in seven months in March as more Americans got vaccinated and the government doled out additional pandemic relief money, marking the start of what could be the strongest economic performance this year in nearly four decades. Nonfarm payrolls surged by 916,000 jobs last month, the biggest gain since last August. Data for February was revised higher to show 468,000 jobs created instead of the previously reported 379,000. Still, employment remains 8.4 million jobs below its peak in February 2020. Economists had forecast payrolls increasing by 647,000 jobs in March. Job growth last month was led by the leisure and hospitality sector, where employers hired 280,000 workers.

**Commodities:** Oil prices edged down in early Asian trade on Monday after OPEC+ agreed last week to gradually ease some of its production cuts between May and July.

Gold prices held steady on Monday, buoyed by concerns over inflation after U.S. President Joe Biden announced a \$2 trillion-plus jobs plan last week, while a stronger dollar and elevated U.S. Treasury yields limited bullion's upside.

**Currency:** The dollar was poised to extend gains against major currencies on Monday after the U.S. jobs report at the end of last week showed the nation's labor market is recovering from the impact of the coronavirus shock.

## 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	58298	5733	53770	5287	446	117199	12336	122164	12740	-4965	-404
Index Option	7320859	671538	7279603	666975	4563	630500	67057	990549	100484	-360049	-33427
Stock Future	121498	11690	127240	11968	-278	1072544	93220	1071930	91591	614	1629
Stock Option	83578	8180	83837	8230	-50	116548	10275	103311	8829	13237	1446
<b>Total</b>	<b>7584233</b>	<b>697141</b>	<b>7544450</b>	<b>692460</b>	<b>4681</b>	<b>1936791</b>	<b>182888</b>	<b>2287954</b>	<b>213644</b>	<b>-351163</b>	<b>-30756</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
22-Mar-21	7466	7189	277
23-Mar-21	7812	7841	(29)
24-Mar-21	5889	7499	(1610)
25-Mar-21	7540	10428	(2888)
26-Mar-21	7003	6608	395
<b>Month to date-Mar</b>	<b>185695</b>	<b>166570</b>	<b>19124</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
25-Mar-21	6669	10053	(3384)
26-Mar-21	6317	6367	(50)
30-Mar-21	10120	9350	769
31-Mar-21	7658	9344	(1686)
1-Apr-21	7279	7130	149
<b>Month to date-Apr</b>	<b>7279</b>	<b>7130</b>	<b>149</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
25-Mar-21	7823	5556	2268
26-Mar-21	5877	4174	1703
30-Mar-21	11262	9081	2181
31-Mar-21	6161	4079	2082
1-Apr-21	3622	3919	(297)
<b>Month to date-Apr</b>	<b>3622</b>	<b>3919</b>	<b>(297)</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
22-Mar-21	564	185	379
23-Mar-21	856	675	181
24-Mar-21	2408	393	2015
25-Mar-21	790	743	47
26-Mar-21	1888	1017	871
<b>Month to date-Mar</b>	<b>14152</b>	<b>19693</b>	<b>(5540)</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2130	70%	1594	79%
Decline	764	25%	355	18%
Unchanged	149	5%	57	3%

Market Turnover	01-Apr	31-Mar	Var (%)
BSE Cash	3641	3411	7%
NSE Cash	58765	56778	3%
NSE Futures	97738	86707	13%
NSE Options	7243300	3451042	110%
Total (Rs.Cr)	7403445	3597938	106%

Volatility Index	01-Apr	31-Mar
Volatility Index	19.99	20.65

Index PE – TTM	01-Apr	Yr. High	Yr. Low
Sensex	34.8	36.2	18.0
Nifty	33.6	42.0	19.7

## Corporate News

**IL&FS subsidiary receives Rs 1,804 crore from NHAI as settlement**

An arm of IL&FS has received Rs 1,804 crore as claim settlement from the National Highways Authority of India (NHAI). This will help the subsidiary address its Rs 3,500-crore debt. (BS)

**Govt to slap recovery notice on Vedanta's Cairn after Delhi HC judgment**

The oil ministry will seek tens of millions of dollars from Vedanta's Cairn Oil & Gas after the Delhi High Court held that the firm was liable to pay higher profit share to the government in lieu of its Rajasthan oil and gas block license being extended beyond initial term. (BS)

**Green energy arm of NTPC to raise Rs 2,100 crore through term loan**

NTPC Renewable Energy (NTPC REL) is raising a term loan of Rs 2,100 crore and will tie-up working capital facility of Rs 700 crore to finance projects. Its parent NTPC has set a target of achieving 32 Gw renewable energy capacity by 2030. The debt tie-up for the existing projects is underway, while equity would be infused by NTPC. The company has already received equity of Rs 300 crore from the total committed equity of Rs 4,000 crore from the parent. NTPC REL would fund the projects in a debt-to-equity ratio of 4:1. (BS)

**Bajaj Electricals declares layoff at Uttar Pradesh unit**

BajajElectricals said it has declared layoff at its manufacturing unit located at Shikohabad in Uttar Pradesh. The layoff is with effect from April 3, 2021, until further notice. The board of Bajaj Electricals on March 25, 2021, had approved rolling out of a VRS for 281 permanent employees, in the "workmen and staff" category at Shikohabad unit. (ET)

**Maruti Suzuki gets notice from customs, DRI for allegedly evading duty over 'dubious' hybrid tech**

Directorate of revenue intelligence (DRI) and customs authorities have served a show-cause notice to Maruti Suzuki for allegedly evading around Rs 71-crore duty over 'dubious' hybrid technology used in Ciaz, Ertiga and S-cross. (ET)

**RIL plans global payments play via NUE**

Reliance Industries' proposed New Umbrella Entity (NUE) for payments services, in a consortium with Infibeam Avenue, Google and Facebook, has plans to make it a global payments player. The conglomerate, will likely offer payment services overseas, probably pitting it against giants Visa and Mastercard in some markets if it gets the operating licence. (ET)

Top 5 Nifty Gainers	01-Apr	31-Mar	Var(%)
JSWSTEEL	509	468	8.6%
HINDALCO	350	327	7.2%
TATASTEEL	863	812	6.3%
ADANI PORTS	736	702	4.8%
INDUSINDBK	993	954	4.1%
Top 5 Nifty Losers	01-Apr	31-Mar	Var(%)
HINDUNILVR	2399	2432	-1.3%
HDFCLIFE	691	696	-0.7%
NESTLEIND	17083	17165	-0.5%
HDFCBANK	1487	1494	-0.5%
TCS	3165	3178	-0.4%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	50,030	1.1%	1.7%	-0.5%	77.0%
MIDCAP	20,516	1.7%	2.1%	-0.3%	98.4%
SMLCAP	21,072	2.0%	3.1%	1.3%	121.6%
AUTO	22,591	1.5%	0.8%	-6.7%	113.5%
BANKEX	38,239	1.8%	2.0%	-3.8%	83.1%
Capital Goods	21,448	1.7%	2.8%	-3.2%	100.8%
FMCG	12,867	-0.1%	2.6%	5.0%	30.0%
Health Care	21,529	0.9%	3.3%	0.8%	79.9%
IT	26,770	0.9%	2.1%	5.3%	120.8%
METAL	15,127	5.4%	12.3%	7.3%	170.7%
Oil & Gas	15,086	1.8%	1.0%	-5.6%	53.8%
Power	2,544	2.8%	0.0%	1.2%	90.0%
Realty	2,678	0.3%	1.3%	-5.9%	102.5%

NSE USD Futures	01-Apr	31-Mar	Var (%)
April Expiry (Rs./\$)	73.45	73.45	0.0%
May Expiry (Rs./\$)	73.72	73.72	0.0%
Total Turnover (Rs. Crore)	36785	36785	0%

Sectors	TTM PE
Auto	35.27
Auto Ancillary	80.70
Banking	28.98
Engineering	27.75
Cement	33.86
Diamonds & Jewellery	121.61
Housing Finance	29.86
Infrastructure & Const	35.55
Metals-Aluminium	20.51
Metal – Steel	14.74
Oil Expl.	39.95
Pharma	31.64
Power – Gen. Supp.	25.21
Information Tech.	30.81
Sugar	6.29
Telecom Serv. Prov.	33.84
Tyres	23.62

## Economy News

### Commerce ministry makes import registration compulsory for host of aluminium, copper products

The commerce ministry has made import registration compulsory for 46 copper and 43 aluminium items under non-ferrous metal import monitoring system, a move which could discourage inbound shipments of such goods and promote their local manufacturing. (ET)

### Government gives nod to 422 ethanol projects, likely to attract investment of Rs 41,000 crore

The government has given in principle approval to 422 ethanol projects, which may add annual production capacity by 1,675 crore litres. These projects, which are likely to bring a combined investment Rs 41,000 crore, would get soft loan from banks on easier terms. This would benefit farmers and fast track the programme of ethanol blending with petrol to reduce dependency on oil imports. The government has set a target of achieving 8.5% ethanol blending this year, followed by 10% next year and 20% by 2025 (ET)

### Govt approves over Rs 6,100 crore-worth highway projects

The government approved highway projects worth more than Rs 6,176 crore. These projects pertain to seven states and union territories, including Maharashtra, Assam and Ladakh. (ET)

### India's forex reserves fall by \$2.986 billion to \$579.285 billion

The country's foreign exchange reserves declined by \$2.986 billion to reach \$579.285 bn in the week ended March 26. In the previous week ended March 19, the forex kitty had increased by \$233 million to \$582.271 bn. It had touched a record high of \$590.185 bn in the week ended Jan 29, 2021. (MC)

## International Corporate News

### Tesla files a petition against U.S. labor board order

Tesla Inc has filed an appeal on a U.S. National Labor Relations Board ruling that the electric-car maker had violated U.S. labor law. The company filed a petition with the New Orleans-based U.S. Court of Appeals to review the NLRB's decision and order issued on March 25. In the petition, Tesla asked the court to review the order and grant Tesla "any further relief which the Court deems just and equitable." (Reuters)

### Kakao Mobility secures strategic investment from Google

Kakao Mobility has secured a strategic investment from Google of 56.5 billion won. Kakao Mobility's app, Kakao T, has 28 million registered users, and offers South Korea's most popular taxi-hailing service as well as other transportation services. (Inv)

### Alphabet Waymo self-driving unit CEO stepping down

The head of Alphabet Inc's self-driving unit Waymo announced that he will be stepping down as CEO. Dmitri Dolgov, one of the founders of the Google self-driving car project and Tekedra Mawakana, who was Waymo's chief operating officer and has worked at a number of tech firms, will serve as co-CEOs. John Krafcik, a long-time auto industry executive who has headed Waymo for more than five years, will stay on as an advisor. (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	19.01	4213138	18.72	8991621	1.55%	1	1393.96	1385.20	0.6%
Tata Motors	21.03	619990	20.79	1268129	1.15%	5	308.42	307.75	0.2%
Wipro	6.50	1784850	6.34	1824220	2.52%	1	476.63	416.40	14.5%
Dr.Reddy's	62.72	167327	61.39	270898	2.17%	1	4599.10	4587.65	0.2%
ICICI Bank	16.21	4032773	16.03	5781448	1.12%	2	594.32	594.40	0.0%
HDFC Bank	77.74	1710961	77.69	2762042	0.06%	3	1900.16	1486.75	27.8%

GDR's (US\$)				
	Prices	Prev. Close	Change	Var %
L&T	19.54	19.24	0.30	1.6%
RIL	55.45	55.30	0.15	0.3%
SBI	50.40	49.60	0.80	1.6%

10 year G-Sec Yield	Current	Previous	Change
US	1.72%	1.72%	0 bps
Japan	0.12%	0.13%	(0) bps
India	6.17%	6.15%	2 bps
UK	0.80%	0.80%	0 bps
Libor 3 Mths	0.20%	0.19%	1 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	582	582	0.0%
Inflation – WPI	4.17%	2.03%	214bps
Inflation – CPI	5.08%	4.06%	102 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)	5587	4911	676

IIP Growth -%	Jan-21	Jan-20	YTD-FY21
IIP	-1.6	2.5	-17.5
Mining	-3.7	-1.0	-13.3
Manufacturing	-2.0	2.9	-19.7
Electricity	5.5	4.5	-5.6

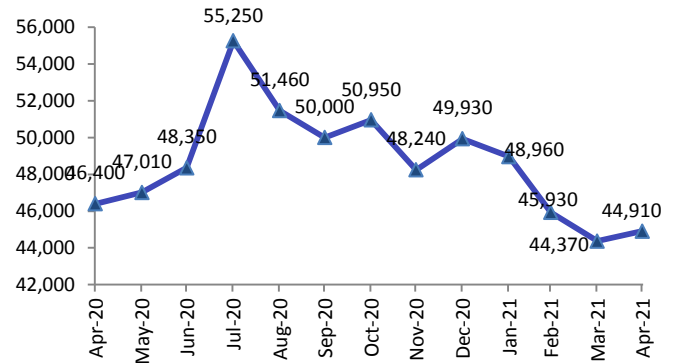
US Economy Data	Current	Previous
Inflation (%) (YoY)	1.70%	1.40%
Unemployment (%)	6.00%	6.20%

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	6.50%	4.90%
Inflation – CPI (%)	-0.20%	-0.30%

Gold (Rs/10 gm) (Source: BBG)



	Date
Indian GDP Data	31 May
Indian Inflation Data CPI	12 Apr
Indian Inflation Data WPI	14 Apr
Indian Monetary Policy	7 Apr
India's Industrial Production (IIP)	12 Apr
US Inflation Data	13 Apr
US GDP	24 Apr
US Unemployment Data	07 May
US Fed Rate	28 Apr
China GDP	16 Apr
China Inflation Data	09 Apr

Event Update		
Co. Name	Date	Purpose
Railtel Corporation Of India Ltd.	05/04/21	Rs.1.00 per share(10%)Interim Dividend
Saregama India Ltd.	06/04/21	Rs.20.00 per share(200%)Interim Dividend
SBI Life Insurance Company Ltd.	06/04/21	Rs.2.50 per share(25%)Interim Dividend
Shriram Transport Finance Company Ltd.	06/04/21	Rs.6.00 per share(60%)Second Interim Dividend
Libas Consumer Products Ltd.	07/04/21	Issue of Bonus Shares in the ratio of 1:5
NACL Industries Ltd.	07/04/21	Rs.0.15 per share(15%)Second Interim Dividend
Shriram City Union Finance Ltd.	07/04/21	Rs.10.00 per share(100%)Second Interim Dividend
Edelweiss Financial Services Ltd.	08/04/21	Rs.0.90 per share(90%)Interim Dividend
India Nippon Electricals Ltd.	09/04/21	Rs.6.00 per share(120%)Interim Dividend
Kama Holdings Ltd.	09/04/21	Rs.108.00 per share(1080%)Interim Dividend
Premco Global Ltd.	09/04/21	Rs.2.00 per share(20%)Second Interim Dividend
Rail Vikas Nigam Ltd.	09/04/21	Rs.1.14 per share(11.4%)Interim Dividend
SIS Ltd.	09/04/21	Buy Back of Shares
Britannia Industries Ltd.	10/04/21	Interim Dividend
Rama Phosphates Ltd.	12/04/21	Rs.1.00 per share(10%)Interim Dividend
Pritika Auto Industries Ltd.	13/04/21	Stock Split from Rs.10/- to Rs.2/-
Sharda Motor Industries Ltd.	19/04/21	Stock Split from Rs.10/- to Rs.2/-
Vesuvius India Ltd.	20/04/21	Rs.7.00 per share(70%)Dividend

## Bulk Deal AS On 01/04/21

BSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
539544	ABHIINFRA	PRIYADARSINI DWARAMPUDI	B	18700	4.62
539872	BAJAJHCARE	ESCORP ASSET MANAGEMENT LIMITED	S	195000	442.4
539872	BAJAJHCARE	SHRI RAVINDRA MEDIA VENTURES PRIVATE LIMITED	S	70000	441.7
539872	BAJAJHCARE	VINOD HARILAL JHAVERI	S	100000	441.12
500069	BNKCAP	RAJASTHAN GLOBAL SECURITIES PRIVATE LIMITED	B	89863	179.67
538765	JSHL	VIVEK DWIVEDI	B	80000	10.11
540360	LLFICL	B M TRADERS	S	63156	69.45
540360	LLFICL	TOUCHLINE SECURITIES PRIVATE LIMITED	B	67464	69.34
543282	NIKSTECH	SHERWOOD SECURITIES PVT LTD	B	5400	203.17
540404	PRIMEFRESH	GURMEETSINGH BHAMRAH	B	21000	150
540404	PRIMEFRESH	KAJOL BHATIA	S	21000	150
540404	PRIMEFRESH	MORLEY FABRICS PRIVATE LIMITED	B	46000	150
540404	PRIMEFRESH	PLATINUMLINE INVESTMENT & TRADING CO LTD	S	23000	150
539026	SSPNFIN	ASHOK KUMAR SINGH	S	36000	16.98
539026	SSPNFIN	ASHOK KUMAR SINGH	B	76000	17.19
539026	SSPNFIN	BHARAT BHUSHAN	B	40000	16.98
539026	SSPNFIN	CHANDA SONI	B	40000	16.8
539026	SSPNFIN	DHARMENDRASINH SHIVBHA JADEJA	S	40000	16.8
539026	SSPNFIN	ESPS FINSERVE PRIVATE LIMITED	S	76000	17.17
539041	SVPHOUSING	DEEPALI AGGARWAL	S	82500	7.92
539041	SVPHOUSING	MAHENDER KUMAR GUPTA HUF	S	57500	7.92
539041	SVPHOUSING	NSMK INVESTMENTS PRIVATE LIMITED	B	200000	7.92
590073	WHEELS	STANDARD CHARTERED MUTUAL FUND	S	251582	452.55

NSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
ASIANTILES	Asian Granito India Limit	PAUL PETER P	SELL	214856	157.76
EPL	EPL Limited	VANGUARD FUNDS PUBLIC LIMITED COMPANY VANGUARD FTSE ALL WORLD ETF	BUY	1643796	240
FELIX	Felix Industries Ltd.	AYSHWARYA SYNDICATE	BUY	28000	45.42
HISARMETAL	Hisar Metal Ind. Limited	SATYANARAYAN J KABRA	BUY	30000	123
JUMPNET	Jump Networks Limited	DHWAJA SHARES & SECURITIES PVT LTD	BUY	525000	9.5
JUMPNET	Jump Networks Limited	ESAAR INDIA LIMITED	SELL	930000	9.44
SAKAR	Sakar Healthcare Limited	AFFILADO EDUCATION SYSTEM LLP	SELL	111248	117.33
SEAMECLTD	SEAMEC Limited	NOMURA SINGAPORE LIMITED	BUY	250000	449.96
WHEELS	Wheels India Ltd	STANDARD CHARTERED MF A/C. STANDARD CHARTERED PREMIER EQUITY	SELL	318418	452.7

**Disclosure:**

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