

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	33527	33153	374	1.1%
Dow Futures	33347	33415	-68	-0.2%
Nasdaq	13706	13480	225	1.7%
FTSE	6737	6737	UNCH	UNCH%
Nikkei	30089	-221	-0.7%	29868
Hang Seng	28939	28939	UNCH	UNCH
SGX CNX Nifty	14724	14723	1	0.0%
Straits Singapore	3206	3210	-3	-0.1%
South Korea	3120	3121	-1	0.0%
Taiwan	16752	16571	180	1.1%
Shanghai	3482	3484	-3	-0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8790	8790	UNCH	UNCH
Alumin (\$/MT)	2226	2226	UNCH	UNCH
Zinc (\$/MT)	2775	2775	UNCH	UNCH
Brent Crude (\$/bbl)	62.9	62.2	0.7	1.1%
Gold (\$/Ounce)	1734	1728	6.1	0.4%
Silver (\$/Ounce)	25.0	24.9	0.1	0.4%
Light Crude (\$/bbl)	59.4	58.7	0.7	1.3%
N G (\$/mmbtu)	2.5	2.5	0.0	0.5%
Sugar (\$/MT)	418.7	417.0	1.7	0.4%
Rubber (Rs./kg)	172.0	170.0	2.0	1.2%
Baltic Dry Index	2072	2046	26.0	1.3%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	73.30	73.33	-0.03%
Rs./ Euro	86.07	86.38	-0.36%
Rs./Chinese Yuan	11.18	11.16	0.15%
Yen /\$ rate	110.32	110.18	0.13%
\$ US/Euro	1.18	1.18	-0.06%

Dollar Index	Current	Previous	Var(%)
Dollar Index	92.66	92.60	0.07%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	14500	32400
Support 2	14370	32000
Resistance	14800	33270

Securities in Ban For Trade	
NIL	

Market Review

US: The Nasdaq composite led with a 1.7% increase that gave the composite some breathing room above the 50-day moving average. The index also topped the March highs. The S&P 500 added 1.4% and the Dow Jones Industrial Average 1.1% as both indexes made record highs. But small caps took the day off, as the Russell 2000 index lagged with an increase of less than 0.4%.

Asia: Shares in Asia-Pacific were mixed in Tuesday trade, after major indexes on Wall Street surged to record closing highs overnight stateside.

India: A record jump in the Covid-19 cases in the country which led to lockdown-like restrictions in the economically important state of Maharashtra spooked investors on Monday. Besides, a weak PMI manufacturing print for March added fuel to the fire, raising concerns about the pace and strength of the economic recovery. Sensex ended 870 points, or 1.74%, down at 49,159 levels. Nifty 50 settled at 14,638 levels, down 229 points or 1.5%. **Market is expected to open on a flattish note and likely to witness sideways move during the day.**

Global Economy: U.S. services industry activity surged to a record high amid robust growth in new orders, in the latest indication of a roaring economy that is being boosted by increased vaccinations and massive fiscal stimulus. The index rebounded to a reading of 63.7 last month also lifted by warmer weather. That was the highest in the survey's history and followed 55.3 in February. Economists had forecast the index rising to 59.0 in March. The vastly improved public health situation and the White House's \$1.9 trillion COVID-19 pandemic rescue package were providing a powerful tailwind to the economy. The new orders for the services industry rebounded to an all-time high of 67.2 in March from a nine-month low of 51.9 in February.

Commodities: Oil prices rose early on Tuesday as a drop in the U.S. dollar made crude a more attractive buy, paring losses of more than 4% incurred overnight on the prospect of producers returning more than 2 million barrels per day of supply to the market by July.

Gold prices rose on Tuesday, as a weaker dollar made bullion cheaper and more attractive for buyers outside the United States, while a pull-back in U.S. Treasury yields provided further support.

Currency: The dollar sank to an almost two-week low versus a basket of its peers on Tuesday, moving in tandem with retreating Treasury yields from recent peaks despite signs of a robust U.S. economic recovery.

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	63124	5983	80565	7786	-1803	121144	12510	117199	12336	3945	174
Index Option	3846825	365979	3848798	366257	-278	803447	82082	630500	67057	172947	15025
Stock Future	139937	12895	164049	15186	-2291	1081986	92387	1072544	93220	9442	-833
Stock Option	141551	13036	141160	13046	-10	127381	11065	116548	10275	10833	790
Total	4191437	397893	4234572	402275	-4382	2133958	198044	1936791	182888	197167	15156

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
23-Mar-21	7812	7841	(29)
24-Mar-21	5889	7499	(1610)
25-Mar-21	7540	10428	(2888)
26-Mar-21	7003	6608	395
1-Apr-21	14664	16358	(1694)
Month to date-Apr	14664	16358	(1694)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
26-Mar-21	6317	6367	(50)
30-Mar-21	10120	9350	769
31-Mar-21	7658	9344	(1686)
1-Apr-21	7279	7130	149
5-Apr-21	4444	5376	(932)
Month to date-Apr	11723	12505	(782)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
26-Mar-21	5877	4174	1703
30-Mar-21	11262	9081	2181
31-Mar-21	6161	4079	2082
1-Apr-21	3622	3919	(297)
5-Apr-21	5098	5022	75
Month to date-Apr	8719	8941	(221)
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
23-Mar-21	856	675	181
24-Mar-21	2408	393	2015
25-Mar-21	790	743	47
26-Mar-21	1888	1017	871
1-Apr-21	2493	844	1649
Month to date-Apr	2493	844	1649

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1023	33%	623	30%
Decline	1934	62%	1374	66%
Unchanged	184	6%	85	4%

Market Turnover	05-Apr	01-Apr	Var (%)
BSE Cash	4444	3641	22%
NSE Cash	65169	58765	11%
NSE Futures	114402	97738	17%
NSE Options	2853745	7243300	-61%
Total (Rs.Cr)	3037760	7403445	-59%

Volatility Index	05-Apr	01-Apr
Volatility Index	21.22	19.99

Index PE – TTM	05-Apr	Yr. High	Yr. Low
Sensex	34.3	36.2	18.4
Nifty	33.1	42.0	20.1

Corporate News

JSPL reports a 20% rise in annual sales for FY 21, production up by 19% year-on-year

Steelmaker Jindal Steel and Power Limited has reported a 20% jump in sales at 7.28 MT for the FY21 with production up by 19% to 7.51 mt. The company's March sales jumped 61% yoy to 786,000 tonnes and production rose by 21% yoy to 730,000 tonnes. Exports have accounted for 35% of sales in FY21 compared to 13% in the prior year. (ET)

Sobha clocks record sales bookings of Rs 3,137 cr in FY21 despite COVID

Realty firm Sobha Ltd reported record sales bookings of Rs 3,137 cr during the last fiscal year despite the COVID-19 pandemic. Its sales bookings stood at Rs 2,880.6 cr in the FY20. The company achieved 9% higher sales in value terms and 10% higher average price realization as compared to FY2019-20. In the fourth quarter of last fiscal, sales bookings grew 54% to Rs 1,072 crore from Rs 694.5 crore in the previous year. (ET)

RDIF, Panacea Biotec to produce 100 million doses of Sputnik V vaccine in India per year

The Russian Direct Investment Fund (RDIF) and drug firm Panacea Biotec said they have agreed to produce 100 million doses per year of Sputnik V COVID-19 vaccine in India. Production of Sputnik V at Panacea Biotec sites will help facilitate global supply of Sputnik V to international partners of RDIF. (ET)

Tilaknagar Inds to manufacture products for Pernod Ricard

Alcoholic beverages maker, Tilaknagar Industries Limited said it has signed a deal with French distiller Pernod Ricard to make their products at their Maharashtra manufacturing unit. The agreement will be valid for the next ten years and could be extended to more states in the near future. (ET)

Adani Ports invests Rs 2,800 cr to up stake in Krishnapatnam Port to 100%

Adani Ports announced acquisition of the residual 25% stake in Adani Krishnapatnam Port for Rs 2,800 cr. This will result in APSEZ increasing its stake from 75% to 100% in Krishnapatnam Port. (BS)

Consumer goods major Marico bets on double-digit volume growth in Q4

Consumer goods major Marico said that it expected to deliver a strong double-digit volume growth in the Q4FY21, though input cost pressures would hurt operating margins. The company saw healthy momentum across key categories. Marico expects low double-digit bottom-line growth in Q4. (BS)

Top 5 Nifty Gainers	05-Apr	01-Apr	Var(%)
HCLTECH	1034	1003	3.1%
TCS	3239	3165	2.3%
BRITANNIA	3700	3619	2.3%
WIPRO	425	416	2.2%
INFY	1410	1385	1.8%
Top 5 Nifty Losers	05-Apr	01-Apr	Var(%)
BAJFINANCE	4963	5272	-5.9%
INDUSINDBK	937	993	-5.6%
SBIN	354	371	-4.6%
EICHERMOT	2517	2631	-4.3%
M&M	774	808	-4.1%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	49,159	-1.7%	1.5%	-2.5%	78.2%
MIDCAP	20,284	-1.1%	3.3%	-1.5%	98.5%
SMLCAP	20,845	-1.1%	3.9%	-0.4%	121.5%
AUTO	21,998	-2.6%	0.9%	-7.3%	114.2%
BANKEKX	36,913	-3.5%	-0.8%	-7.0%	86.9%
Capital Goods	21,028	-2.0%	1.8%	-3.9%	98.7%
FMCG	12,684	-1.4%	3.6%	3.0%	27.1%
Health Care	21,572	0.2%	4.7%	1.7%	74.0%
IT	27,294	2.0%	6.0%	7.3%	131.7%
METAL	15,273	1.0%	13.4%	9.8%	179.4%
Oil & Gas	14,804	-1.9%	1.7%	-8.0%	47.9%
Power	2,543	0.0%	2.9%	1.1%	91.0%
Realty	2,581	-3.6%	0.2%	-9.3%	95.3%

NSE USD Futures	05-Apr	01-Apr	Var (%)
April Expiry (Rs./\$)	73.55	73.45	0.1%
May Expiry (Rs./\$)	73.82	73.72	0.1%
Total Turnover (Rs. Crore)	24350	36785	-34%

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

India imposes anti-dumping duty on flexible slabstock polyol imports from Saudi Arabia, UAE for 5 years

India has imposed anti-dumping duty on imports of flexible slabstock polyol originating in or exported from Saudi Arabia and United Arab Emirates, ranging between \$101.8 and \$235.02 per metric tonne, for a period of five years.(ET)

RBI clears over Rs 21,000 cr towards CCL for wheat procurement in Punjab

RBI cleared a sum of Rs 21,658.73 crore towards Cash Credit Limit (CCL) up to end April-2021 for the procurement of wheat in Punjab during the ensuing rabi marketing season. With this, the bulk of the CCL sought by the state government for the purchase of 105.60 lakh tonnes of wheat for this season has been released by the central bank(ET)

March manufacturing activity hits 7-month low, PMI at 55.4

Manufacturing activity in India grew at its slowest pace in seven months, restricted by the Covid-19 pandemic with production and new orders expanding at softer rates and employment declining amid waning business confidence. The seasonally adjusted IHS Markit India Manufacturing PMI fell to a seven-month low of 55.4 in March from 57.5 in February.(ET)

International Corporate News

GameStop to sell up to 3.5 mn of shares

GameStop, said that it will sell up to 3.5 million of its share with the price still vastly elevated. The company said the shares will be sold through an at-the-market offering, which lets a publicly traded company raise capital over time. (Business Standard)

ViacomCBS to buy Chilevision from WarnerMedia in Latin America push

ViacomCBS Inc agreed to buy broadcaster Chilevision from AT&T Inc-owned WarnerMedia for an undisclosed sum, as they look to boost their streaming audience in Latin America. The acquisition will bolster ViacomCBS' Americas portfolio, which includes streaming services Paramount+ and Pluto TV as well as Argentine broadcaster Television Federal SA (Telefe). (Reuters)

Exxon sues Energy Transfer over charges from pipeline dispute

Exxon Mobil Corp's XTO Energy shale unit filed a breach of contract lawsuit against Energy Transfer LP over disputed payments for the Dakota Access Pipeline. The suit alleges the pipeline operator hit XTO with deficiency charges and revoked other credits after the oil producer shifted some oil to other outlets last August. Exxon took the actions after a U.S. court ordered Dakota Access Pipeline. (Reuters)

Carl Icahn's investment firm appoints former GE dealmaker as CEO

Activist investor Carl Icahn's investment firm named General Electric Co veteran and a former dealmaker, Aris Kekedjian, as its president and CEO. Kekedjian, who has worked with GE for about three decades until 2019, will replace Icahn Enterprises LP's CEO Keith Cozza. CFO SungHwan Cho will also be departing, the company added. (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	19.37	3919312	19.01	4213138	1.89%	1	1419.89	1409.90	0.7%
Tata Motors	20.93	1627684	21.03	619990	-0.48%	5	306.85	305.05	0.6%
Wipro	6.54	970503	6.50	1784850	0.62%	1	479.41	425.45	12.7%
Dr.Reddy's	62.12	264605	62.72	167327	-0.96%	1	4553.63	4556.60	-0.1%
ICICI Bank	15.83	10711397	16.21	4032773	-2.34%	2	580.20	571.25	1.6%
HDFC Bank	75.84	971257	77.74	1710961	-2.44%	3	1853.12	1449.60	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	1.69%	1.70%	(1) bps
Japan	0.12%	0.12%	0 bps
India	6.12%	6.17%	(4) 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)	6398	6396	2

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

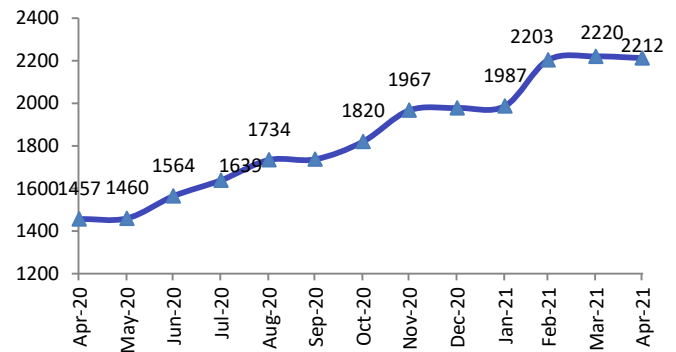
US Economy Data	Current	Previous
Inflation (%) (YoY)	1.70%	1.40%
Unemployment (%)	6.00%	6.20%

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%

Aluminum (LME Spot Price - \$/ton) (Source: Westmetall)



	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
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 05/04/21

BSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
540190	FRANKLININD	NIKUNJ SURESHCHANDRA SHAH	S	19050	13.68
542666	GKP	HIRA HARESH VORA	S	48000	26.5
542666	GKP	VIHIT INVESTMENT	B	96000	26.03
531337	JUMPNET	ESAAR INDIA LIMITED	S	1000000	9.36
540360	LLFICL	JYOTSANA ASHOKKUMAR SHAH	S	28000	70.56
519455	NARBADA	AARTI	S	100000	25.7
519455	NARBADA	DEVENDER KUMAR	B	100000	25.7
540198	OSIAJEE	POONAM SANJEEV MISHRA	S	38800	22.34
540027	PTIL	ESAAR INDIA LIMITED	B	72301	299.37
539561	REMLIFE	NIRAJ LAHERCHAND MODI	B	20301	40.09
540821	SADHNA	ANGAD DEEP SINGH	S	75000	10.1
540821	SADHNA	GAURAV GUPTA	B	75000	10.11
NSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
FELIX	Felix Industries Ltd.	HEMLATABEN AJITBHAI VASA	SELL	32000	43.68
JUMPNET	Jump Networks Limited	ARVIND SHANTILAL SHAH	BUY	600000	9.1
JUMPNET	Jump Networks Limited	ESAAR INDIA LIMITED	SELL	900000	9.06
JUMPNET	Jump Networks Limited	OLGA TRADING PRIVATE LIMITED	BUY	950961	9.12
RMDRIP	R M Drip & Sprink Sys Ltd	HARSHIT SHAH	BUY	112000	20.4
RMDRIP	R M Drip & Sprink Sys Ltd	RUPAL SHRIKANT SHAH	SELL	112000	20.4

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