

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	34137	33821	316	0.9%
Dow Futures	33997	34016	-19	-0.1%
Nasdaq	13950	13786	164	1.2%
FTSE	6895	6860	35	0.5%
Nikkei	29106	28509	597	2.1%
Hang Seng	28745	28622	123	0.4%
SGX CNX Nifty	14198	14446	-248	-1.7%
Straits Singapore	3175	3155	20	0.6%
South Korea	3186	3172	15	0.5%
Taiwan	17329	17202	127	0.7%
Shanghai	3475	3473	2	0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9445	9322	123.0	1.3%
Alumin (\$/MT)	2365	2310	55.0	2.4%
Zinc (\$/MT)	2815	2814	1.0	0.0%
Brent Crude (\$/bbl)	64.8	65.3	-0.5	-0.7%
Gold (\$/Ounce)	1794	1794	-0.1	0.0%
Silver (\$/Ounce)	26.5	26.6	-0.1	-0.3%
Light Crude (\$/bbl)	60.9	61.4	-0.5	-0.8%
N G (\$/mmbtu)	2.7	2.7	0.0	0.3%
Sugar (\$/MT)	463.3	462.1	1.2	0.3%
Rubber (Rs./kg)	163.0	163.0	0.0	0.0%
Baltic Dry Index	2472	2432	40.0	1.6%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	75.46	74.88	0.77%
Rs./ Euro	90.62	90.31	0.34%
Rs./Chinese Yuan	11.64	11.63	0.08%
Yen /\$ rate	107.99	108.08	-0.08%
\$ US/Euro	1.20	1.20	0.08%

Dollar Index	Current	Previous	Var(%)
Dollar Index	91.05	91.16	-0.12%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	14100	30550
Support 2	14000	30000
Resistance	14500	31640

Securities in Ban For Trade	
SAIL	
SUNTV	

Market Review

US: U.S. stocks were higher after the close on Wednesday, as gains in the Basic Materials, Oil & Gas and Financials sectors led shares higher.

Asia: Asian stocks rose on Thursday, extending a rebound in global markets following a sharp selloff earlier this week, while oil prices eased again on worries about rising COVID-19 cases in some parts of the world.

India: The Sensex was at 47,705.80, down 243.62 points, or 0.51%, while the Nifty was at 14,296.40, down 63.05 points, or 0.44%. Among broader indices, both the BSE midcap and smallcap indices closed 0.49% higher. The Nifty midcap100 and smallcap100 closed 0.30% and 1% lower, respectively. **Market is expected to open gap down and likely to witness sideways move during the day.**

Economy: Canada's annual inflation rate doubled to 2.2% in March, as the central bank signaled economic slack would likely be absorbed earlier than it had previously forecast. Previously, the Bank of Canada had said it would be 2023 before inflation returned sustainably to its 2% target. On Tuesday, the central bank said it would happen in the second half of next year. In the meantime, inflation would temporarily breach its target, the bank said.

President Joe Biden on Wednesday announced tax credits for certain businesses that pay employees who take time off to get COVID-19 shots, a new effort to involve corporate America in his vaccination campaign

Britain's unemployment rate unexpectedly fell for a second month in a row to 4.9% in the December-to-February period, most of which the country spent under a tight COVID-19 lockdown

Commodities: Oil prices fell for a third day on Thursday as a surprise build in U.S. crude inventories and a resurgence of COVID-19 cases in India and Japan raised concerns that a recovery in global economy and fuel demand may slow.

Gold prices rose on Thursday to hover near an eight-week high touched in the last session, as a sagging dollar and weaker U.S. Treasury yields boosted the metal's appeal, while palladium held close to an all-time high hit in the previous session.

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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	60248	5459	56234	5152	307	126640	12846	136536	13840	-9896	-994
Index Option	5136113	454542	5160118	457019	-2477	1047523	104545	1056466	106038	-8943	-1493
Stock Future	133362	11900	136224	12342	-442	1120414	94093	1116590	93890	3824	203
Stock Option	191627	17295	191968	17277	18	219691	19059	211100	18328	8591	731
Total	5521350	489196	5544544	491790	-2594	2514268	230543	2520692	232096	-6424	-1553

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
9-Apr-21	6320	6928	(608)
13-Apr-21	15444	17926	(2482)
15-Apr-21	11642	12454	(813)
16-Apr-21	9339	10084	(745)
19-Apr-21	6359	8013	(1654)
Month to date-Apr	91241	98283	(7041)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
13-Apr-21	8556	9287	(731)
15-Apr-21	11711	10732	980
16-Apr-21	7512	7075	438
19-Apr-21	6382	8016	(1634)
20-Apr-21	8723	9805	(1082)
Month to date-Apr	88393	94360	(5966)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
13-Apr-21	4558	4314	244
15-Apr-21	4980	5506	(527)
16-Apr-21	5524	4866	658
19-Apr-21	6843	4488	2356
20-Apr-21	5595	4272	1323
Month to date-Apr	62885	57741	5144
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
9-Apr-21	548	1255	(707)
13-Apr-21	1314	969	345
15-Apr-21	2146	1711	434
16-Apr-21	2343	244	2100
19-Apr-21	3399	2550	849
Month to date-Apr	13952	11576	2376

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1613	53%	1073	53%
Decline	1268	42%	828	41%
Unchanged	168	6%	116	6%

Market Turnover	20-Apr	19-Apr	Var (%)
BSE Cash	3934	3909	1%
NSE Cash	69939	68103	3%
NSE Futures	102192	106362	-4%
NSE Options	4069291	2976938	37%
Total (Rs.Cr)	4245357	3155313	35%

Volatility Index	20-Apr	19-Apr
Volatility Index	22.43	22.49

Index PE - TTM	20-Apr	Yr. High	Yr. Low
Sensex	32.6	36.2	18.6
Nifty	32.0	42.0	20.3

Corporate News

Hero MotoCorp, Gogoro to launch new electric scooters and bikes in India

The alliance between these two will ensure that Hero-branded electric bikes and scooters will be launched in India and will be ably supported by Gogoro's battery swapping technology. These electric bikes, scooters will also use Gogoro technology and will be developed as well as marketed by Hero MotoCorp. With more than 375,000 riders and 2,000 battery swapping stations, Gogoro Network manages 265,000 daily battery swaps. The company has registered more than 174 million total battery swaps to date. (FE)

Credit card issuances decline in Feb; ICICI Bank leads new issuances

The issuance of new credit cards fell in February, with over 5.49 lakh new credit cards being issued during the month, implying a 47% year-on-year (y-o-y) decline and 21.57% month-on-month. The total credit card base stood at 61.6 million at the end of the month, down 8% y-o-y. ICICI Bank continued to lead in fresh issuances, accounting for over 36% of new cards. ICICI Bank was trailed by SBI Card (18.1%) and Axis Bank (18%) in new issuances. In FY21, ICICI Bank gained the highest incremental market share of 32.4%, followed by SBI Card at 30.6%. (FE)

Indiabulls partners with HDFC Ltd to offer home loans

Co-lending partnership with HDFC Ltd will act as a cornerstone to IBH's new balance-sheet light growth business model. Both the home financiers will frame a common credit policy with IBH originating retail housing loans. While HDFC will retain 80% of any such credit on its book, the rest 20% will go to IBH's loan book. Indiabulls will service the loan account throughout the life cycle of the loan. Moreover, technology led co-lending will enable IBH to offer a convenient and seamless experience to its customers. It also helps expand its reach to smaller towns and cities of the country. (ET)

KEC International wins new orders worth Rs 1,245 crore

KEC has won orders of Rs 629 crore for Transmission & Distribution (T&D) projects in India, SAARC, Middle East, Africa, and the Americas. It also won orders worth Rs 446 crore in technologically enabled and conventional segments in India. Further, the company also secured orders of ₹107 crore for infra works in the Defence and industrial segments in India, and Rs 63 crore for various types of cables in India and overseas. (BL)

Top 5 Nifty Gainers	20-Apr	19-Apr	Var(%)
DRREDDY	5157	4968	3.8%
BAJAJFINSV	9819	9470	3.7%
BAJFINANCE	4614	4480	3.0%
HDFCLIFE	685	666	2.9%
BAJAJ-AUTO	3601	3516	2.4%
Top 5 Nifty Losers	20-Apr	19-Apr	Var(%)
ULTRACEMCO	6201	6510	-4.7%
HCLTECH	961	995	-3.3%
HDFC	2416	2492	-3.1%
GRASIM	1292	1325	-2.5%
SHREECEM	29321	30058	-2.5%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	47,706	-0.5%	-0.4%	-4.3%	55.7%
MIDCAP	19,866	0.5%	1.1%	-0.9%	73.1%
SMLCAP	20,776	0.5%	1.1%	1.5%	96.6%
AUTO	21,713	0.9%	2.3%	-5.6%	80.2%
BANKEX	35,300	-0.3%	1.0%	-8.2%	59.5%
Capital Goods	19,973	0.9%	-0.6%	-5.3%	69.6%
FMCG	12,696	-0.6%	-0.8%	1.0%	18.5%
Health Care	23,387	1.2%	3.7%	13.8%	54.9%
IT	26,506	-1.0%	-3.5%	2.0%	111.5%
METAL	15,928	0.3%	4.5%	14.8%	164.7%
Oil & Gas	14,402	0.0%	0.9%	-5.5%	31.6%
Power	2,383	0.1%	1.0%	-5.8%	60.3%
Realty	2,390	0.2%	-1.9%	-8.8%	66.9%

NSE USD Futures	20-Apr	19-Apr	Var (%)
April Expiry (Rs./\$)	75.14	74.95	0.3%
May Expiry (Rs./\$)	75.43	75.26	0.2%
Total Turnover (Rs. Crore)	31988	39249	-18%

Sectors	TTM PE
Auto	33.80
Auto Ancillary	78.71
Banking	27.51
Engineering	27.35
Cement	33.54
Diamonds & Jewellery	120.80
Housing Finance	29.89
Infrastructure & Const	33.72
Metals-Aluminium	20.54
Metal – Steel	16.17
Oil Expl.	40.61
Pharma	33.65
Power – Gen. Supp.	24.35
Information Tech.	30.82
Sugar	6.83
Telecom Serv. Prov.	33.85
Tyres	22.74

Economy News

Maharashtra tightens curbs on office attendance, travel till May 1

Attendance in offices has been capped at 15% and only government employees, medical staff and those seeking medical treatment are allowed to travel in suburban trains, metro and monorail. Curbs have also been imposed on inter-city and inter district travel with restrictions on halts, thermal screening and 14-day quarantine requirements for passengers. Private public transport, excluding busses, can ply only for emergency or essential services or valid reasons with driver and 50 per cent of the seating capacity. Inter-city or inter-district travel will be allowed only for essential purposes or medical emergency. (BS)

Farm exports up 16.88% in Apr-Feb FY21

India's agricultural commodities exports were up by 16.88% to Rs 2.74 lakh crore till February of 2020-21 fiscal from Rs 2.31 lakh crore in the year ago period. Imports of agriculture and allied commodities increased by 3% to Rs 1.41 lakh crore during April-February period of 2020-21 from 1.37 lakh crore in the year-ago period. (ET)

International Corporate News

Boeing's CFO to Retire While Firm Extends CEO's Stay

Boeing announced that its chief financial officer Gregory Smith has decided to retire from the company. The company also announced that it was extending the retirement age for its CEO by five years to 70, thus extending the run of David Calhou, 64. (Inv)

EU gives nod to J&J to resume Vaccine rollout

European regulator gave the nod to Johnson & Johnson to resume supplies of its Covid-19 shots after the company was able to convince the European Medicines Agency that the risk-reward ratio favored the application of the jabs, outscoring safety concerns. J&J said that it remains committed to supplying 200 million doses of its vaccine to the E.U., Norway and Iceland. (Inv)

Israel picks Amazon's AWS, Google for flagship cloud project

Israel's government chose Amazon Web Services (AWS) and Google for a more than \$1 billion project to provide cloud services for the country's public sector and military. This four phases project known as Nimbus includes acquisition and construction of cloud infrastructure, formulating government policy for migrating to the cloud, integration and migration, and control and optimisation of cloud activity. (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	18.10	7225136	18.03	6985203	0.39%	1	1365.85	1351.35	1.1%
Tata Motors	19.63	749562	19.32	1336143	1.60%	5	296.26	298.05	-0.6%
Wipro	7.01	1989345	6.96	1187376	0.72%	1	528.98	470.10	12.5%
Dr.Reddy's	67.84	225918	67.36	168301	0.71%	1	5119.29	5156.75	-0.7%
ICICI Bank	14.70	11519336	14.60	7189863	0.68%	2	554.64	559.10	-0.8%
HDFC Bank	68.48	1480310	68.54	3160921	-0.09%	3	1722.53	1391.40	23.8%

GDR's (US\$)				
	Prices	Prev. Close	Change	Var %
L&T	17.44	17.38	0.06	0.3%
RIL	50.25	50.25	0.00	0.0%
SBI	43.35	43.25	0.10	0.2%

10 year G-Sec Yield	Current	Previous	Change
US	1.54%	1.56%	(2) bps
Japan	0.07%	0.08%	(1) bps
India	6.07%	6.08%	(1) bps
UK	0.74%	0.73%	1 bps
Libor 3 Mths	0.18%	0.19%	(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)	6377	6580	-202

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

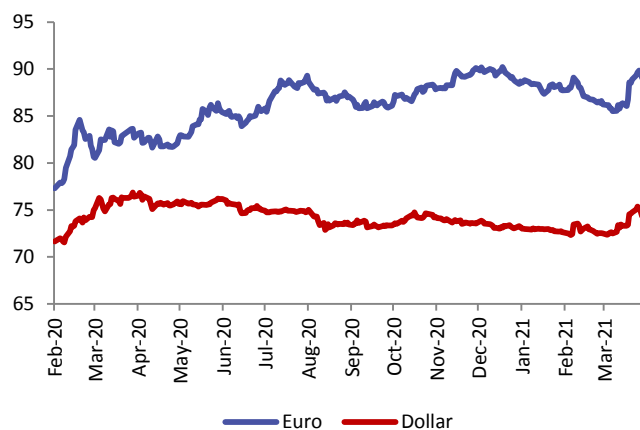
US Economy Data	Current	Previous
Inflation (%) (YoY)	2.60%	1.70%
Unemployment (%)	6.00%	6.20%

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%

Euro & Dollar to Rupee (Source: BBG)



	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	24 Apr
US Unemployment Data	07 May
US Fed Rate	28 Apr
China GDP	15 July
China Inflation Data	11 May



Event Update		
Co. Name	Date	Purpose
Muthoot Finance Ltd.	23/04/21	Rs.20.00 per share(200%)Interim Dividend
Zuari Global Ltd.	28/04/21	Second Interim Dividend
HCL Technologies Ltd.	01/05/21	Interim Dividend
CRISIL Ltd.	06/05/21	Interim Dividend

Bulk Deal AS On 20/04/21

BSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
530881	ABVL	EYANTRA INDUSTRIES PRIVATE LIMITED	B	31000	8.62
541299	DLCL	AJAY KUMAR SEHGAL .	S	24000	25.22
507960	GUJHOTE	VIREN SHANTILAL SHAH	B	20000	101.25
539767	MNIL	ALKA SINGH	S	102074	6.31
539767	MNIL	DEEPAK KUMAR	S	74069	6.31
539767	MNIL	REKHA DAGAR	B	188818	6.31
540198	OSIAJEE	ACVC FOREX PRIVATE LIMITED	B	38026	24.77
539291	OZONeworld	AARNAH CAPITAL ADVISORS PVT LTD	S	22500	67.45
539291	OZONeworld	JAYANTA RAY CHOUDHURY	B	22501	67.34
539291	OZONeworld	RAJKUMAR SINGH	S	21701	59.13
541634	RAWEDGE	SHASHANK PRAVINCHANDRA DOSHI	S	64000	38
539026	SSPNFIN	BHARAT BHUSHAN	S	40000	14.3
539026	SSPNFIN	CHANDA SONI	B	80000	13.93
539026	SSPNFIN	ESPS FINSERVE PRIVATE LIMITED	B	84000	14.01
539026	SSPNFIN	SUBASH RAMASHISH MISHRA	S	84000	13.93
539406	SWAGTAM	GOPAL AGARWAL	B	20500	13.38
539406	SWAGTAM	OMOLARA TEXTILES PRIVATE LIMITED	S	20000	13.38
539406	SWAGTAM	PUSHP LATA SHARMA	B	48730	13.38
539406	SWAGTAM	RAMILABEN RASIKLAL DOSHI	S	48300	13.38
513305	TERRASCOPE	DHARMENDRA LAKHAN SINGH SINH	S	103556	1.96
513305	TERRASCOPE	SHANKARLAL KUMHAR	S	100000	1.96
513305	TERRASCOPE	SUNIL .	S	215000	1.96
531771	TOWASOK	ANJU DEVI AGRAWAL	S	35675	4.95
531771	TOWASOK	SHARAD KANAYALAL SHAH	B	42575	4.95
539222	VMV	RAMESH RAMSHANKAR VYAS	B	35000	9.67
539222	VMV	RANA PARTHRAJSINH SIDDHRAJSINH	S	30000	9.6
NSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
KDDL-RE	KDDL RE	ELEVATION CAPITAL V FII HOLDINGS LIMITED	SELL	8791	360.21
KDDL-RE	KDDL RE	JUPITER INDIA FUND	SELL	18758	350.46
MITTAL	Mittal Life Style Limited	NAGARATHNAMMA .	SELL	71362	8.72
SOLARA	Solara Active Pha Sci Ltd	FIRST STATE INVESTMENT	BUY	230000	1462.3
SOLARA	Solara Active Pha Sci Ltd	JITESH DEVENDRA	SELL	230000	1462.3
SOLARA	Solara Active Pha Sci Ltd	JITESH DEVENDRA	SELL	230000	1462.3
SONAHISONA	Sona Hi Sona Jewell G Ltd	NNM SECURITIES PVT LTD	BUY	150000	12
SONAHISONA	Sona Hi Sona Jewell G Ltd	SHASHANK PRAVINCHANDRA DOSHI	SELL	150000	12
VIKASECO	Vikas EcoTech Limited	CANARA BANK SECURITIES LTD	SELL	4812015	1.67
VIVIMEDLAB	Vivimed Labs Limited	TUSHAR RAMESHCHANDRA MEHTA	SELL	743486	27.6

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