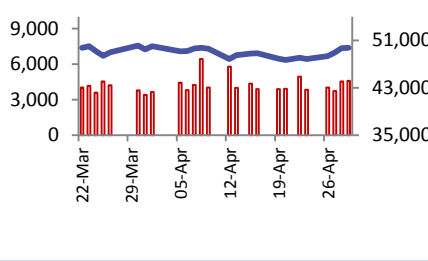
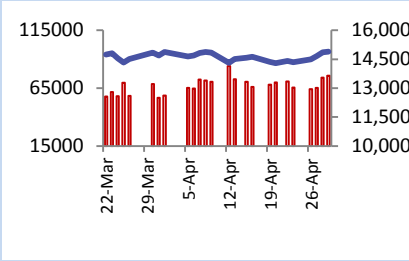


BSE



Open	50094
High	50376
Low	49536
Close	49766
Change	32
Volume (Lacs)	3838
Turnover (Rs.inCr)	4590

NSE



Open	14979
High	15044
Low	14814
Close	14895
Change	30
Volume(Lacs)	29268
Turnover (Rs.in Cr)	75807

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	34060	33820	240	0.7%
Dow Futures	33891	33951	-60	-0.2%
Nasdaq	14083	14051	32	0.2%
FTSE	6961	6964	-2	0.0%
Nikkei	28899	29054	-155	-0.5%
Hang Seng	28862	29303	-442	-1.5%
SGX CNX Nifty	14781	14931	-151	-1.0%
Straits Singapore	3229	3222	8	0.2%
South Korea	3158	3174	-16	-0.5%
Taiwan	17567	17568	-1	0.0%
Shanghai	3449	3475	-26	-0.7%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9885	9876	9.0	0.1%
Alumin (\$/MT)	2417	2400	17.5	0.7%
Zinc (\$/MT)	2919	2920	-0.5	0.0%
Brent Crude (\$/bbl)	68.3	68.6	-0.3	-0.5%
Gold (\$/Ounce)	1767	1772	-5.0	-0.3%
Silver (\$/Ounce)	25.9	26.1	-0.2	-0.7%
Light Crude (\$/bbl)	64.6	65.0	-0.4	-0.6%
N G (\$/mmbtu)	2.9	2.9	0.0	-0.3%
Sugar (\$/MT)	453.2	462.7	-9.5	-2.1%
Rubber (Rs./kg)	165.0	165.0	0.0	0.0%
Baltic Dry Index	2957	2889	68.0	2.4%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	74.04	74.37	-0.44%
Rs./ Euro	89.73	89.74	-0.02%
Rs./Chinese Yuan	11.45	11.44	0.06%
Yen /\$ rate	108.78	108.93	-0.14%
\$ US/Euro	1.21	1.21	-0.02%

Dollar Index	Current	Previous	Var(%)
Dollar Index	90.64	90.61	0.02%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	14770	33250
Support 2	14650	32840
Resistance	15000	34170

Securities in Ban For Trade	
NIL	

Market Review

US: The Dow Jones Industrial Average climbed as the Nasdaq and S&P 500 hit new highs. Stocks reversed higher in afternoon trading although remained positive.

Asia: Asia-Pacific markets struggled for gains Friday as investors turned cautious, despite a positive finish stateside in the previous session.

India: After a gap-up start to the day, Indian markets trimmed most of the gains to end flat as investors were divided between a host of positive and negative cues. While strong Q4 earnings performance and loose monetary policy lent support to the sentiment, a record jump in Covid cases in the country kept investors on tenterhooks. Besides, economic indicators have also started pointing to the impact arising from lockdown-like restrictions. The latest is an analysis by the economists at SBI that suggests the business activity index has fallen below the level before the coronavirus pandemic, affected by lockdowns and restrictions in cities and states to slow down the outbreak.

Market is expected to open gap down and likely to witness profit booking during the day.

Global Economy: US GDP grew at an annualized rate of 6.4% in the first quarter, up from 4.3% in the fourth quarter of 2020 and faster than consensus forecasts of a 6.1% rate. The acceleration was due in large measure to the \$1.9 trillion stimulus package approved by Congress earlier in the year that distributed a new round of stimulus checks to households. Consumer spending grew at an annualized 10.7% as a result. Confidence in the euro-area economy improved sharply in April as the region's vaccination campaign picked up speed, paving the way for a lifting of coronavirus restrictions in the coming months. European Commission sentiment index increased to 110.3, exceeding all estimates. The highest reading since 2018 reflects improvements across all parts of the economy and the European Union's six largest members.

Commodities: Oil prices slipped on Friday, taking a breather after touching their highest in six weeks as economic recovery and bullish summer fuel demand outlook outweighed concerns of wider lockdowns in India and Brazil to curb COVID-19 pandemic.

Gold prices edged down on Friday as higher U.S. Treasury yields dampened the metal's appeal, while palladium eased off a record high scaled a day earlier.

Currency: The U.S. dollar skidded toward a fourth straight weekly decline against a basket of major peers on Friday, as the Federal Reserve stuck to its message of ultra-low interest rates for longer.

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	93871	9370	101051	10019	-649	94347	9956	144463	15209	-50116	-5253
Index Option	11976434	1098648	11960686	1096168	2480	586978	62763	1162475	120998	-575497	-58235
Stock Future	272002	25364	269473	24883	481	1055711	92609	1196876	104730	-141165	-12121
Stock Option	146456	13741	132226	12593	1148	62331	5465	192696	17057	-130365	-11592
Total	12488763	1147123	12463436	1143663	3460	1799367	170793	2696510	257994	-897143	-87201

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
22-Apr-21	9597	10502	(904)
23-Apr-21	6677	7853	(1176)
26-Apr-21	7795	8850	(1055)
27-Apr-21	5777	6886	(1109)
28-Apr-21	7889	6976	913
Month to date-Apr	138023	149124	(11101)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
23-Apr-21	6729	8090	(1361)
26-Apr-21	7661	8773	(1112)
27-Apr-21	5528	6983	(1455)
28-Apr-21	7823	7057	766
29-Apr-21	6399	5590	809
Month to date-Apr	132153	141380	(9228)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
23-Apr-21	5152	3456	1696
26-Apr-21	6518	5495	1023
27-Apr-21	6485	5021	1463
28-Apr-21	6349	5913	436
29-Apr-21	4222	5165	(942)
Month to date-Apr	97348	87678	9669
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
22-Apr-21	284	846	(562)
23-Apr-21	816	1240	(425)
26-Apr-21	995	866	129
27-Apr-21	416	337	79
28-Apr-21	212	478	(267)
Month to date-Apr	17474	16757	717

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1373	44%	867	43%
Decline	1574	50%	1042	52%
Unchanged	175	6%	102	5%

Market Turnover	29-Apr	28-Apr	Var (%)
BSE Cash	4590	4542	1%
NSE Cash	75807	74159	2%
NSE Futures	194911	179470	9%
NSE Options	9749059	4173736	134%
Total (Rs.Cr)	10024367	4431907	126%

Volatility Index	29-Apr	28-Apr
Volatility Index	23.31	22.58

Index PE – TTM	29-Apr	Yr. High	Yr. Low
Sensex	32.9	36.2	18.6
Nifty	32.8	42.0	20.3

Corporate News

Rahul Bajaj steps down as Bajaj Auto chairman; Niraj Bajaj to take charge

Effective May 1, Rahul Bajaj, Bajaj Group patriarch who has been at the helm of the company for over five decades, will move to the role of chairman emeritus, making way for his younger sibling Niraj Bajaj. This follows his resignation from the holding company Bajaj Holdings & Investments and listed companies that include Bajaj Auto and Bajaj Finserv, on January 30, 2020. (BS)

SBI business activity index falls below pre-Covid level as lockdowns return

State Bank of India's business activity index has fallen below the level before the coronavirus pandemic, affected by lockdowns and restrictions in cities and states to slow down the outbreak. The in-house Index of India's largest bank dipped to a low of 75.7 — a level it had attained in August 2020, "and now a clear 24.3% down from pre pandemic level". All indicators, except for labour participation and electricity consumption, have declined significantly in April, the index shows. (BS)

S&P downgrades Future Retail's issuer credit rating on debt recast

Global rating agency Standard & Poor's has downgraded Future Retail Ltd's long term rating issuer credit rating from "CCC-" to "SD", amounting to default. The rating action follows restructuring of onshore debt. India-based Future Retail has completed the one-time restructuring of its onshore debt (about Rs 10,200 crore) that includes extending the maturity of its term loans and other borrowings. The restructuring constitutes a distressed exchange. (BS)

Ujjivan Financial Services' minority shareholders reject special resolution to appoint Samit Ghosh as MD&CEO

Ujjivan Financial Services' minority shareholders have rejected a special resolution to appoint founder and chairman Samit Ghosh as managing director and chief executive officer of the company, according to results of the e-voting sent to stock exchanges. Also, shareholders didn't approve the special resolution to re-appoint Abhijit Sen as an independent director. Both resolutions received 70% of the valid votes in favour. However, these being special resolutions in nature, required a minimum of 75% of the valid votes polled in favour of the resolution or a minimum of three times of the votes polled against the resolution. (MC)

Top 5 Nifty Gainers	29-Apr	28-Apr	Var(%)
JSWSTEEL	727	663	9.6%
BAJAJFINSV	11177	10489	6.6%
TATASTEEL	1031	971	6.2%
BAJFINANCE	5485	5281	3.9%
HINDALCO	372	363	2.6%
Top 5 Nifty Losers	29-Apr	28-Apr	Var(%)
EICHERMOT	2463	2521	-2.3%
HEROMOTOCO	2860	2926	-2.3%
HCLTECH	910	924	-1.5%
HDFC	2539	2577	-1.5%
BAJAJ-AUTO	3836	3890	-1.4%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	49,766	0.1%	3.5%	0.5%	47.6%
MIDCAP	20,445	-0.2%	2.6%	1.3%	70.2%
SMLCAP	21,686	0.1%	3.8%	5.0%	95.3%
AUTO	21,981	-1.1%	1.2%	-1.2%	64.7%
BANKEKX	38,302	0.1%	6.2%	2.0%	54.9%
Capital Goods	20,432	-0.5%	2.2%	-3.1%	67.7%
FMCG	12,634	-0.3%	0.1%	-1.9%	17.3%
Health Care	23,356	0.2%	-0.3%	9.5%	52.3%
IT	26,524	-0.1%	0.2%	-0.1%	86.3%
METAL	17,810	5.2%	9.8%	24.1%	164.0%
Oil & Gas	14,801	0.3%	2.0%	-0.1%	22.7%
Power	2,494	-0.2%	4.3%	0.8%	67.4%
Realty	2,483	-0.1%	2.5%	-7.0%	71.2%

NSE USD Futures	29-Apr	28-Apr	Var (%)
April Expiry (Rs./\$)	74.36	74.41	-0.1%
May Expiry (Rs./\$)	74.69	74.71	0.0%
Total Turnover (Rs. Crore)	25898	36839	-30%

Sectors	TTM PE
Auto	33.50
Auto Ancillary	78.47
Banking	26.83
Engineering	27.21
Cement	30.88
Diamonds & Jewellery	114.77
Housing Finance	29.16
Infrastructure & Const	32.87
Metals-Aluminium	19.89
Metal – Steel	15.24
Oil Expl.	39.31
Pharma	33.97
Power – Gen. Supp.	24.34
Information Tech.	29.89
Sugar	7.07
Telecom Serv. Prov.	25.80
Tyres	22.39

Economy News

India's gold demand up 37% YoY in March qtr; global demand dips 23%: WGC

Demand for gold in India in the January – March 2021 quarter surged 37% to 140 tonne as compared to the previous corresponding period, said World Gold Council (WGC) on Thursday. In value terms, the demand was higher by 57% YoY at Rs 58,800 Cr during the period under review. The demand in India during the March 2021 quarter is in stark contrast to the demand globally, which dropped 23% YoY to 815.7 tonne. Jewellery demand, too, rose 39% YoY at 102.5 tonnes, and was up 58% YoY in value terms at Rs 43,100 Cr. (BS)

Demand for work surges 89% under MGNREGA in April

Demand for work by households under the rural employment guarantee scheme increased by 89% to 2.54 crore households in April so far, against 1.34 crore a year earlier. The number of people demanding work under the scheme rose to 3.66 crore compared with 2 crore in April 2020, as per the data from the rural development ministry. (ET)

Unemployment rate likely to be 8% compared to 6.5% in March in India: CMIE

The unemployment rate in India has shot up within the first two weeks of April and the month-to-month unemployment price is prone to be close to 8% in comparison with 6.5% in March with decrease absorption of labour in the market, says the Centre for Monitoring Indian Economy. As per CMIE data, unemployment rates in India in April stood at 8.2%, 8.6%, 8.4% and 7.4% within the first 4 weeks of the month. (ET)

International Corporate News

GM to invest \$1 billion in Mexico to build electric vehicles

General Motors Co said on Thursday it will invest \$1 billion in a manufacturing complex in Mexico, as it prepares to build electric vehicles in 2023 in the border state of Coahuila. GM said it is building a new high-tech paint shop that will start operations from June at the Ramos Arizpe site, which currently assembles conventional internal-combustion vehicles. (Reuters)

IBM to acquire software provider Turbonomic for over \$1.5 bn

IBM said it has agreed to acquire Turbonomic, a provider of software that helps companies monitor the performance of their business applications. The transaction values Turbonomic at between \$1.5 billion and \$2 billion. (Reuters)

Volkswagen's CEO to step aside at Skoda, Seat

Volkswagen boss Herbert Diess is stepping down as head of the supervisory boards at subsidiaries Seat and Skoda to focus on building up a stronger software-development team. At Seat, Diess would be succeeded by current technology head Thomas Schmall and at Skoda by Murat Aksel, head of procurement on the Volkswagen board. (ET)

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	18.46	6545711	18.23	5157136	1.26%	1	1366.78	1356.35	0.8%
Tata Motors	20.10	1075048	20.43	752613	-1.62%	5	297.64	301.90	-1.4%
Wipro	7.31	924620	7.21	1788234	1.39%	1	541.23	489.85	10.5%
Dr.Reddy's	68.96	96426	68.00	146640	1.41%	1	5105.80	5102.30	0.1%
ICICI Bank	16.77	7388905	16.77	7206174	0.00%	2	620.83	621.45	-0.1%
HDFC Bank	73.13	1481835	74.22	2736762	-1.47%	3	1804.85	1472.50	22.6%

GDR's (US\$)				
	Prices	Prev. Close	Change	Var %
L&T	18.08	18.30	-0.22	-1.2%
RIL	54.80	54.60	0.20	0.4%
SBI	47.70	48.40	-0.70	-1.4%

10 year G-Sec Yield	Current	Previous	Change
US	1.65%	1.63%	1 bps
Japan	0.10%	0.10%	(0) bps
India	6.06%	6.06%	1 bps
UK	0.84%	0.80%	5 bps
Libor 3 Mths	0.19%	0.18%	1 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)	5739	5745	-5

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

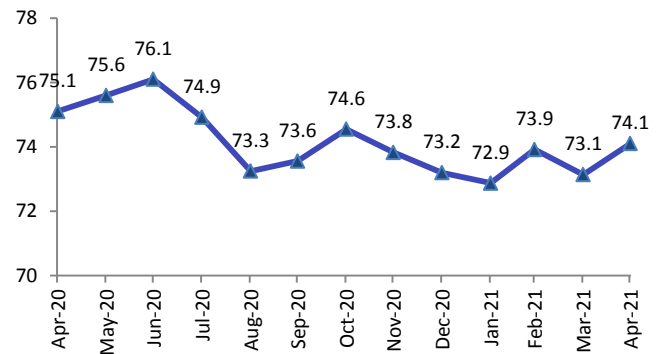
US Economy Data	Current	Previous
Inflation (%) (YoY)	2.60%	1.70%
Unemployment (%)	6.00%	6.20%

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%

USD/INR (Source: Investing.com)



	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
Angel Broking Ltd.	30/04/21	Rs.7.50 per share(75%)Third Interim Dividend
HCL Technologies Ltd.	01/05/21	Interim Dividend
Ishan Dyes & Chemicals Ltd.	01/05/21	Rs.1.25 per share(12.5%)Interim Dividend
Quick Heal Technologies Ltd.	03/05/21	Buy Back of Shares
Gateway Distriparks Ltd.	05/05/21	First Interim Dividend
CRISIL Ltd.	06/05/21	Rs.7.00 per share(700%)Interim Dividend
Infosys Ltd.	01/06/21	Rs.15.00 per share(300%)Final Dividend

Bulk Deal AS On 29/04/21

BSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
531739	GENNEX	GOODPOINT TRADERS PRIVATE LIMITED	S	886035	6.7
531739	GENNEX	PRAGYA MERCANTILE PVT LTD	B	1250000	6.7
540704	MATRIMONY	CMDB II	S	632651	900.89
540704	MATRIMONY	CMDB II	S	500000	900
540704	MATRIMONY	TATA TRUSTEE COMPANY LIMITEE TRUSTEE FOR TATA MUTUAL FUND	B	500000	900
540704	MATRIMONY	TATA TRUSTEE COMPANY LIMITEE TRUSTEE FOR TATA MUTUAL FUND	B	500000	900
540259	SHANGAR	SAMIRBHAI RASIKLAL SHAH	S	1000000	13.5
503804	SHRIDINE	VARSHA SHARAD SHAH	S	46000	420.11
538920	SPACEAGE	ALPHA LEON ENTERPRISES LLP	S	23036	40.7
539026	SSPNFIN	DEVJEET CHAKRABORTY	S	44000	10.64
539026	SSPNFIN	ESPS FINSERVE PRIVATE LIMITED	B	40000	10.67
NSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
BESTAGRO	Best Agrolife Limited	SIDHIVINAYAK CHEMTECH PRIVATE LIMITED	BUY	196000	495
BESTAGRO	Best Agrolife Limited	STEPPING STONE CONSTRUCTION PRIVATE LIMITED	SELL	176344	495
FELIX	Felix Industries Ltd.	SILKON TRADES LLP	SELL	36000	42.55
FILATEX	Filatex India Ltd	SWARNIM COMMOSALE PVT LTD	BUY	2000000	81.54
GENESYS	Genesys International Cor	AEGIS INVESTMENT FUND	BUY	327535	97.4
GENESYS	Genesys International Cor	ASPIRE EMERGING FUND	SELL	327535	97.4
IDFC	IDFC Limited	PLUTUS WEALTH MANAGEMENT LLP	BUY	10000000	50.46
MAANALU	Maan Aluminium Limited	RAJ KUMAR JAIN	BUY	36300	180.37
MCLEODRUSS	McLeod Russel India Limit	BHANSALI VENTURES	SELL	605000	22.03
MMFL	MM Forgings Ltd.	KUWAIT INVESTMENT AUTHORITY FUND F239	SELL	137290	463.76
RADIOCITY	Music Broadcast Limited	HDFC STANDARD LIFE INSURANCE CO LTD	SELL	2244453	23.1
PNC	Pritish Nandy Comm. Ltd.	ALPHA LEON ENTERPRISES LLP	SELL	75415	52.33

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