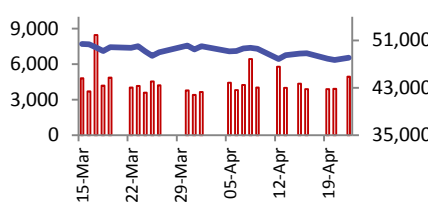
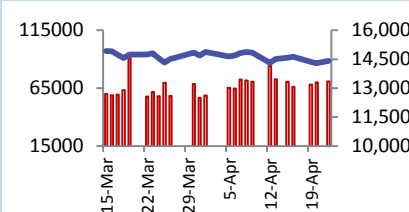


### BSE



Open	47502
High	48143
Low	47205
Close	48081
Change	375
Volume (Lacs)	3053
Turnover (Rs.inCr)	4955

### NSE



Open	14219
High	14425
Low	14151
Close	14406
Change	110
Volume(Lacs)	25207
Turnover (Rs.in Cr)	70751

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	33816	34137	-321	-0.9%
Dow Futures	33758	33709	49	0.1%
Nasdaq	13818	13950	-132	-0.9%
FTSE	6938	6895	43	0.6%
Nikkei	28975	29188	-213	-0.7%
Hang Seng	29068	28755	313	1.1%
SGX CNX Nifty	14323	14402	-79	-0.5%
Straits Singapore	3176	3188	-12	-0.4%
South Korea	3182	3178	5	0.1%
Taiwan	17187	17097	90	0.5%
Shanghai	3478	3465	12	0.4%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9401	9445	-44.0	-0.5%
Alumin (\$/MT)	2363	2365	-1.5	-0.1%
Zinc (\$/MT)	2823	2815	7.5	0.3%
Brent Crude (\$/bbl)	65.7	65.4	0.3	0.4%
Gold (\$/Ounce)	1788	1784	4.3	0.2%
Silver (\$/Ounce)	26.2	26.1	0.0	0.2%
Light Crude (\$/bbl)	61.8	61.4	0.4	0.6%
N G (\$/mmbtu)	2.8	2.7	0.0	0.1%
Sugar (\$/MT)	462.4	463.3	-0.9	-0.2%
Rubber (Rs./kg)	162.0	163.0	-1.0	-0.6%
Baltic Dry Index	2710	2472	238.0	9.6%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	74.95	75.46	-0.68%
Rs./ Euro	90.24	90.62	-0.41%
Rs./Chinese Yuan	11.54	11.55	-0.10%
Yen /\$ rate	107.94	107.97	-0.03%
\$ US/Euro	1.20	1.20	0.07%

Dollar Index	Current	Previous	Var(%)
Dollar Index	91.24	91.33	-0.10%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	14200	31350
Support 2	14120	31000
Resistance	14500	32200

Securities in Ban For Trade	
IBULHSGFIN	
SAIL	
SUNTV	

### Market Review

**US:** U.S. stocks were lower after the close on Thursday, as losses in the Basic Materials, Oil & Gas and Technology sectors led shares lower.

**Asia:** Asian shares rose on Friday after the European Central Bank left policy unchanged, extending a rebound following a sharp selloff earlier in the week, but gains were capped as investors considered the impact of a possible U.S. capital gains tax hike.

**India:** Indian indices, Sensex and Nifty ended higher Thursday led by gains in metals and banking stocks amid positive global cues. Midcaps and smallcaps indices gained. FMCG, pharma and IT indices ended in the red. **Market is expected to open on a flattish note and likely to witness sideways move during the day**

**Economy:** Japan's manufacturing activity expanded for a third month in April while a contraction in the service sector continued amid a fresh wave of coronavirus infections. The au Jibun Bank Japan's purchasing managers index for manufacturing sector activity rose 0.6 point to 53.3, while its measure of service sector activity was unchanged at 48.3

U.S. home sales fell to a seven-month low in March, pulled down by an acute shortage of properties, which is boosting prices and making owning a house more expensive for some first-time buyers. Existing home sales dropped 3.7% to a seasonally adjusted annual rate of 6.01 million units last month, the lowest level since August 2020

The number of Americans filing new claims for unemployment benefits fell to a 13-month low last week, suggesting layoffs were subsiding and strengthening expectations for another month of blockbuster job growth in April as a re-opening economy unleashes pent-up demand. Initial claims for state unemployment benefits decreased 39,000 to a seasonally adjusted 547,000 for the week ended April 17, the lowest since mid-March 2020

**Commodities:** Oil prices rose on Friday on hopes of a fuel demand recovery in the United States and Europe as economic growth picks up and lockdowns ease, but worries about India's raging second wave of COVID-19 cases kept a lid on gains.

Gold gained on Friday and was poised for a third straight weekly rise as a softer U.S. dollar, falling Treasury yields and a dip in equities after U.S. President Joe Biden's proposal to hike capital gains tax encouraged investors to flock towards bullion.

**Currency:** The dollar was hemmed into a narrow trading range on Friday as traders contemplate the next moves by major central banks ahead of a U.S. Federal Reserve meeting next week.

## 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	69752	6331	65273	5894	437	109899	11161	126640	12846	-16741	-1685
Index Option	11525718	991369	11452589	983439	7930	787067	80845	1047523	104545	-260456	-23700
Stock Future	172023	17234	160417	16159	1075	1138594	96306	1120414	94093	18180	2213
Stock Option	194409	17994	192908	17880	114	223408	19597	219691	19059	3717	538
<b>Total</b>	<b>11961902</b>	<b>1032928</b>	<b>11871187</b>	<b>1023372</b>	<b>9556</b>	<b>2258968</b>	<b>207909</b>	<b>2514268</b>	<b>230543</b>	<b>-255300</b>	<b>-22634</b>

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)
<b>Month to date-Apr</b>	<b>91241</b>	<b>98283</b>	<b>(7041)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
15-Apr-21	11711	10732	980
16-Apr-21	7512	7075	438
19-Apr-21	6382	8016	(1634)
20-Apr-21	8723	9805	(1082)
22-Apr-21	9620	10529	(910)
<b>Month to date-Apr</b>	<b>98013</b>	<b>104889</b>	<b>(6876)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
15-Apr-21	4980	5506	(527)
16-Apr-21	5524	4866	658
19-Apr-21	6843	4488	2356
20-Apr-21	5595	4272	1323
22-Apr-21	5737	4887	850
<b>Month to date-Apr</b>	<b>68622</b>	<b>62628</b>	<b>5994</b>
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
<b>Month to date-Apr</b>	<b>13952</b>	<b>11576</b>	<b>2376</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1724	56%	1136	56%
Decline	1203	39%	782	39%
Unchanged	157	5%	99	5%

Market Turnover	22-Apr	20-Apr	Var (%)
BSE Cash	4955	3934	26%
NSE Cash	70751	69939	1%
NSE Futures	120959	102192	18%
NSE Options	8728273	4069291	114%
Total (Rs.Cr)	8924939	4245357	110%

Volatility Index	22-Apr	20-Apr
Volatility Index	23.03	22.43

Index PE – TTM	22-Apr	Yr. High	Yr. Low
Sensex	33.1	36.2	18.6
Nifty	32.2	42.0	20.3

## Corporate News

**VIL's enterprise arm unveils post-paid plans for businesses, working professionals**

'Vi Business Plus', the mobility solution, enables mobile workforce to connect, communicate, collaborate and do more with their post-paid plans. At a starting price of Rs 299, Vi Business Plus would offer enterprises, small businesses, and their workforce increased flexibility to connect in an "efficient and secure manner, no matter where they operate from". Beyond connectivity, Vi Business plans to offer a slew of value-added benefits including mobile security, location tracking, data pooling and entertainment. (FE)

**Tata Motors: Jaguar Land Rover output at two UK plants hit by chips shortage**

Output at two of Jaguar Land Rover's (JLR) British car factories will be temporarily halted from Monday, due to COVID-19 supply chain disruption, including a lack of semi-conductors. JLR has adjusted production schedules for certain vehicles which means that our Castle Bromwich and Halewood manufacturing plants will be operating a limited period of non-production from Monday 26th April. Output at JLR's third British car factory in Solihull, central England, will continue. (ET)

**Torrent Power to set up 300 MW solar power generation in Gujarat**

Torrent Power Limited will set up a 300 MW capacity solar power plant in Gujarat at an estimated cost of Rs1,250 crore. The project will be commissioned within 18 months from the date of execution of the power purchase arrangement. The tariff has been fixed at Rs 2.22 per kWh for a period of 25 years. (Mint)

**Greenpanel, Century Plyboard, Rushil Decor: Anti-dumping duty recommended for MDF boards from Vietnam, Malaysia, Thailand and Indonesia; Approval of revenue department pending**

The Directorate General of Trade Remedies (DGTR) has recommended definitive anti-dumping duty on 'Plain Medium Density Fibre Board' (thickness less than 6 mm) imported from Vietnam, Malaysia, Thailand and Indonesia. Greenpanel Industries and Century Plyboards (India) Ltd had filed the petition seeking anti-dumping probe on such fibre boards from these countries. The definitive anti dumping duty – if imposed by the revenue department – will be valid for five years. (BL)

Top 5 Nifty Gainers	22-Apr	20-Apr	Var(%)
ICICIBANK	579	559	3.6%
WIPRO	487	470	3.5%
JSWSTEEL	641	621	3.2%
TATASTEEL	921	894	3.1%
HDFC	2480	2416	2.6%
Top 5 Nifty Losers	22-Apr	20-Apr	Var(%)
TITAN	1481	1523	-2.8%
SHREECEM	28522	29321	-2.7%
HINDUNILVR	2349	2397	-2.0%
NESTLEIND	16790	17096	-1.8%
ULTRACEMCO	6092	6201	-1.8%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	48,081	0.8%	-1.0%	-3.9%	50.9%
MIDCAP	19,921	0.3%	-0.1%	-2.5%	70.7%
SMLCAP	20,899	0.6%	0.4%	0.6%	93.8%
AUTO	21,714	0.0%	-1.9%	-5.7%	74.4%
BANKEK	36,055	2.1%	-0.1%	-6.3%	55.2%
Capital Goods	19,992	0.1%	-2.5%	-6.2%	72.1%
FMCG	12,620	-0.6%	-1.9%	-0.8%	16.5%
Health Care	23,419	0.1%	4.6%	12.0%	54.1%
IT	26,465	-0.2%	-1.0%	-0.1%	98.7%
METAL	16,225	1.9%	2.8%	17.1%	165.7%
Oil & Gas	14,510	0.7%	-0.5%	-4.5%	29.6%
Power	2,392	0.4%	-0.3%	-6.9%	62.8%
Realty	2,423	1.4%	-3.2%	-11.0%	69.8%

NSE USD Futures	22-Apr	20-Apr	Var (%)
April Expiry (Rs./\$)	75.10	75.14	-0.1%
May Expiry (Rs./\$)	75.40	75.43	0.0%
Total Turnover (Rs. Crore)	34455	31988	8%

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

### Farm exports could grow 20% in 2021-22, say exporters

Higher demand for sugar from Sri Lanka, Bangladesh and Afghanistan and for non-basmati rice from new buyers such as Malaysia and the Philippines along with a spurt in inquiries for vegetables in the Middle East, have made exporters hopeful of a 20% rise in farm exports this fiscal. Officials said enquires for fresh and dehydrated garlic, spices such as chilli, turmeric, ginger, seed spices such as cumin and fennel, and sesame seeds and oil are also on the rise. (ET)

### S&P forecasts 11% growth for India this fiscal, flags 'substantial' impact of broader lockdowns

S&P Global Ratings on Thursday said the Indian economy is projected to grow at 11% in the current fiscal, but flagged the "substantial" impact of broader lockdowns on the economy. This is followed by a 6.1% and a 6.4% forecast increase for the next couple of years. (BS)

## International Corporate News

### FDA approves GSK's endometrial cancer therapy

Food and Drug Administration said it had granted accelerated approval to the GSK's endometrial cancer treatment. The immunotherapy, which was called dostarlimab and is now named Jemperli, is approved to treat patients with severe forms of this kind of cancer who have a genetic feature known as dMMR. A clinical trial with 71 participants found that Jemperli got rid of or reduced dMMR tumors in 42% of the patients. (Inv)

### Etihad Airways to stop operating Boeing 777-300ER jets this year

Abu Dhabi's Etihad Airways will no longer operate Boeing 777-300ER jets after this year, its chief executive said on Wednesday, as it accelerates planes to become a smaller airline. Boeing expects the larger version of the 777 to start entering service by late 2023, three years later than initially planned. (Reuters)

### New York City sues Exxon, BP, Shell in state court over climate change

New York City sues three major oil companies and the top industry trade group in state court after a federal appeals court this month rejected its effort to hold the companies liable to help pay the costs of harm caused by global warming. The lawsuit filed on Thursday said Exxon Mobil Corp, BP Plc, Royal Dutch Shell and industry group the American Petroleum Institute have systematically and intentionally misled consumers about the central role their products play in causing the climate crisis. (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	17.85	9373789	18.10	7225136	-1.38%	1	1337.88	1351.10	-1.0%
Tata Motors	19.20	1629401	19.63	749562	-2.19%	5	287.81	294.55	-2.3%
Wipro	7.17	1667163	7.01	1989345	2.28%	1	537.40	486.65	10.4%
Dr.Reddy's	68.70	186591	67.84	225918	1.27%	1	5149.15	5199.85	-1.0%
ICICI Bank	15.02	15449326	14.70	11519336	2.18%	2	562.88	579.20	-2.8%
HDFC Bank	69.27	1628272	68.48	1480310	1.15%	3	1730.62	1422.50	21.7%

GDR's (US\$)				
	Prices	Prev. Close	Change	Var %
L&T	17.44	17.44	0.00	0.0%
RIL	50.80	50.25	0.55	1.1%
SBI	44.45	43.35	1.10	2.5%

10 year G-Sec Yield	Current	Previous	Change
US	1.56%	1.54%	2 bps
Japan	0.07%	0.07%	(0) bps
India	6.05%	6.07%	(2) bps
UK	0.74%	0.74%	0 bps
Libor 3 Mths	0.17%	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)	5711	6064	-353

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

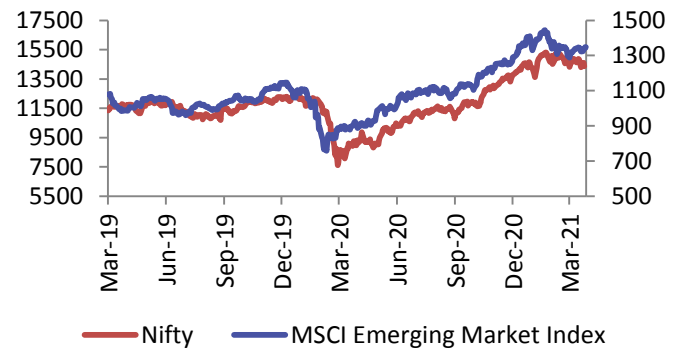
US Economy Data	Current	Previous
Inflation (%) (YoY)	2.60%	1.70%
Unemployment (%)	6.00%	6.20%

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%

Nifty & MSCI Emerging Market Index (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 22/04/21

BSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
500820	ASIANPAINT	ISHARES EM ASIA MAURITIUS CO	S	53826	2553.65
500820	ASIANPAINT	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	53826	2553.65
532215	AXISBANK	ISHARES EM ASIA MAURITIUS CO	S	358380	651.75
532215	AXISBANK	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	358380	651.75
500034	BAJFINANCE	ISHARES EM ASIA MAURITIUS CO	S	33256	4613.65
500034	BAJFINANCE	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	33256	4613.65
532454	BHARTIARTL	ISHARES EM ASIA MAURITIUS CO	S	232386	530.2
532454	BHARTIARTL	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	232386	530.2
500124	DRREDDY	ISHARES EM ASIA MAURITIUS CO	S	20773	5156.75
500124	DRREDDY	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	20773	5156.75
531739	GENNEX	REGIUS SUPPLIERS PRIVATE LIMITED	S	1957962	5.65
542666	GKP	HIRA HARESH VORA	S	40000	27.1
542666	GKP	SHASHANK ASHOK SAWANT	S	52000	27.15
532281	HCLTECH	ISHARES EM ASIA MAURITIUS CO	S	187961	961.3
532281	HCLTECH	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	187961	961.3
500010	HDFC	ISHARES EM ASIA MAURITIUS CO	S	267520	2415.9
500010	HDFC	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	267520	2415.9
500696	HINDUNILVR	ISHARES EM ASIA MAURITIUS CO	S	135603	2397.45
500696	HINDUNILVR	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	135603	2397.45
532174	ICICIBANK	ISHARES EM ASIA MAURITIUS CO	S	810490	559.1
532174	ICICIBANK	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	810490	559.1
500209	INFY	ISHARES EM ASIA MAURITIUS CO	S	538450	1351.35
500209	INFY	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	538450	1351.35
500875	ITC	ISHARES EM ASIA MAURITIUS CO	S	560230	203.55
500875	ITC	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	560230	203.55
543286	JETMALL	BSR FINANCE AND CONSTRUCTION LTD	S	36000	19.4
500228	JSWSTEEL	ISHARES EM ASIA MAURITIUS CO	S	180531	620.6
500228	JSWSTEEL	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	180531	620.6
500510	LT	ISHARES EM ASIA MAURITIUS CO	S	86644	1331.5
500510	LT	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	86644	1331.5
500520	M&M	ISHARES EM ASIA MAURITIUS CO	S	144850	811.15
500520	M&M	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	144850	811.15
532500	MARUTI	ISHARES EM ASIA MAURITIUS CO	S	19800	6646.65
532500	MARUTI	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	19800	6646.65
543262	MRP	MANISH KUMAR JAIN (HUF)	B	15000	35.3
536659	PVVINFRA	VIJAY VASU	S	60411	4.85
539673	RCL	SAMIR SHIVCHANDRA JHA	S	15000	8.71
500325	RELIANCE	ISHARES EM ASIA MAURITIUS CO	S	446600	1901.15
500325	RELIANCE	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	446600	1901.15
500112	SBIN	ISHARES EM ASIA MAURITIUS CO	S	318780	329.5
500112	SBIN	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	318780	329.5
539026	SSPNFIN	ASHOK KUMAR SINGH	S	92000	13.04
539026	SSPNFIN	ASHOK KUMAR SINGH	S	44000	13.5
539026	SSPNFIN	ESPS FINSERVE PRIVATE LIMITED	B	44000	13.58
524715	SUNPHARMA	ISHARES EM ASIA MAURITIUS CO	S	157552	645.15
524715	SUNPHARMA	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	157552	645.15
532070	SUPRBPA	ASHISH JAIN	B	33000	9.5
532540	TCS	ISHARES EM ASIA MAURITIUS CO	S	147916	3144.55
532540	TCS	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	147916	3144.55
532538	ULTRACEMCO	ISHARES EM ASIA MAURITIUS CO	S	19475	6200.85
532538	ULTRACEMCO	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	19475	6200.85
539331	VETO	COMFORT SECURITIES PVT.LTD.	S	100000	127.5
539331	VETO	HARISH D NARWANI	B	100000	127.5
507685	WIPRO	ISHARES EM ASIA MAURITIUS CO	S	221367	470.1
507685	WIPRO	ISHARES MSCI EMERGING MARKETS ASIA ETF	B	221367	470.1

NSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
APOLLOPIPE	Apollo Pipes Limited	RUBY MULTIMEDIA PRIVATE LIMITED	BUY	71000	1015.71
JSL	Jindal Stainless Limited	COHESION MK BEST IDEAS SUB TRUST	BUY	3000000	75.55
JSL	Jindal Stainless Limited	KOTAK SPECIAL SITUATIONS FUND	SELL	7500000	75.59
KDDL-RE	KDDL RE	ELEVATION CAPITAL V FII HOLDINGS LIMITED	SELL	11100	174.5
KDDL-RE	KDDL RE	ELEVATION CAPITAL V LIMITED	SELL	11400	175.08
KDDL-RE	KDDL RE	JUPITER INDIA FUND	SELL	9496	184.42
PAR	Par Drugs and Chem Ltd	NIRAG J SHAH	SELL	32000	125.22
PNC	Pritish Nandy Comm. Ltd.	SUSHMA SHIVKUMAR DAGA	SELL	170000	58.14
VETO	Veto Switchgear Cable Ltd	HARISH DARSHAN SINGH NARWANI	BUY	170000	127.5

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