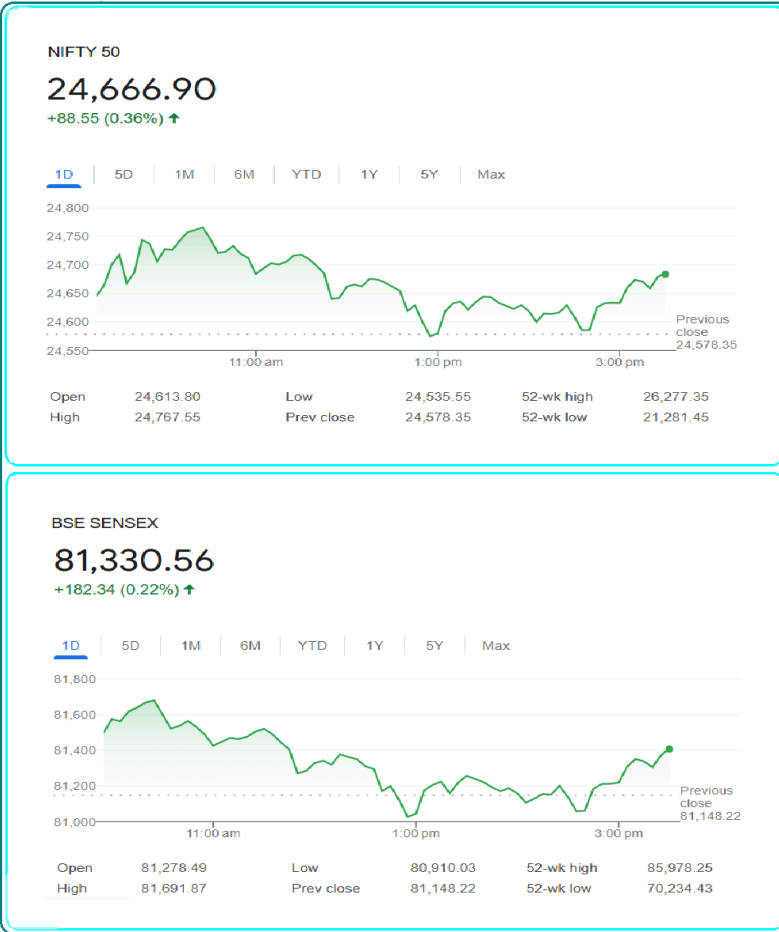


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24666.90	24578.35	0.36%
S&P BSE SENSEX	81330.56	81148.22	0.22%
NIFTY MID100	56136.40	55520.70	1.11%
NIFTY SML100	17147.45	16903.40	1.44%

(Source: [NSE](#), [BSE](#))

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54801.30	54940.85	-0.25%

## Market Wrap Up

- The key equity indices ended with moderate gains today, supported by softer-than-expected WPI, retail, and U.S. inflation data. The Nifty ended above the 24,650 mark.
- The S&P BSE Sensex advanced 182.34 points or 0.22% to 81,330.56. The Nifty 50 index added 88.55 points or 0.36% to 24,666.90.
- The S&P BSE Mid-Cap index rose 1.19% and the S&P BSE Small-Cap index added 1.63%.
- Among the sectoral indices, the Nifty Metal index (up 2.46%), the Nifty Realty index (up 1.70%) and the Nifty IT index (up 1.37%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Bank index (down 0.25%), the Nifty Financial Services Index (down 0.23%) and the Nifty Private Bank index (down 0.19%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **May** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **7036** contracts at the end of the day.
- Long** position build up for the **May** series has been witnessed in **RELIANCE, LT, BHEL, BHARTIARTL, INFY, BAJFINANCE**.
- Short** position build up for the **May** series has been witnessed in **SBIN, ICICIBANK, HDFCBANK**.
- Unwinding** position for the **May** series has been witnessed in **BIOCON, HEROMOTOCO, PNBHOUSING**.

(Source: Capitaline F&O)

NIFTY AUTO	23356.85	23167.25	0.82%
NIFTY FMCG	56351.70	56334.15	0.03%
NIFTY IT	37853.55	37354.60	1.34%
NIFTY METAL	9052.10	8834.65	2.46%
NIFTY PHARMA	21480.50	21359.75	0.57%
NIFTY REALTY	881.00	866.30	1.70%
BSE CG	66938.23	65952.78	1.49%
BSE CD	58623.00	58529.31	0.16%
BSE Oil & GAS	26974.55	26587.61	1.46%
BSE POWER	6657.14	6608.70	0.73%

(Source: [NSE](#), [BSE](#))

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38128.13	38183.26	-0.14%
HANG SENG	23640.65	23108.27	2.30%
STRAITS TIMES	3871.05	3881.05	-0.26%
SHANGHAI	3403.95	3374.87	0.86%
KOSPI	2640.57	2608.42	1.23%
JAKARTA	6979.88	6832.80	2.15%
TAIWAN	21782.87	21330.14	2.12%
KLSE COMPOSITE	1583.51	1582.39	0.07%
ALL ORDINARIES	8520.20	8510.70	0.11%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	115869.00	114942.87
NSE F&O	187758.99	212129.47

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	931.80
NET SELL	-

(Source: [NSE](#))

## Corporate News

- **Bharti Airtel** posted consolidated net sales at Rs 47,876.20 crore in March 2025 up 27.33% from Rs. 37,599.10 crore in March 2024. Net profit at Rs. 11,021.80 crore in March 2025 up 432.04% from Rs. 2,071.60 crore in March 2024.
- **Berger Paints** posted consolidated net profit jumped 17.98% to Rs 262.05 crore in Q4 FY25 as against Rs 222.10 crore posted in Q4 FY24. Revenue from operations rose 7.29% YoY to Rs 2,704.03 crore in the quarter ended 31 March 2025. The company's board has recommended a dividend of Rs 3.80 per equity share.
- **GAIL India** posted consolidated net sales at Rs 36,442.09 crore in March 2025 up 11.25% from Rs. 32,756.32 crore in March 2024. Net profit at Rs. 2,491.76 crore in March 2025 up 0.93% from Rs. 2,468.71 crore in March 2024.
- **Siemens** posted consolidated net sales at Rs 4,259.00 crore in March 2025 down 25.93% from Rs. 5,749.90 crore in March 2024. Net profit at Rs. 582.00 crore in March 2025 down 27.48% from Rs. 802.50 crore in March 2024.
- **Rites** posted consolidated net profit jumped 29.19% to Rs 141.33 crore in Q4 FY25 as against Rs 109.39 crore posted in Q3 FY25. Revenue from operations rose 6.89% to Rs 615.43 crore in the quarter ended 31 March 2025 from Rs 575.76 crore posted in Q3 FY25. The company's board has recommended a final dividend of Rs 2.65 per share.
- **Hindustan Aeronautics** has reported 7.7% fall in consolidated net profit to Rs 3,976.66 crore as revenue from operations declined by 7.3% to Rs 13,699.85 crore in Q4 FY25 as compared with Q4 FY24.
- **TATA MOTORS** posted consolidated net sales at Rs 119,503.00 crore in March 2025 down 0.4% from Rs. 119,986.31 crore in March 2024. Net profit at Rs. 8,470.00 crore in March 2025 down 51.34% from Rs. 17,407.18 crore in March 2024.
- **Alembic** posted consolidated net sales at Rs 60.27 crore in March 2025 up 22.9% from Rs. 49.04 crore in March 2024. Net profit at Rs. 68.45 crore in March 2025 down 5.13% from Rs. 72.15 crore in March 2024.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TATASTEEL	155.31	149.43	3.93%
SHRIRAMFIN	651.95	633.60	2.90%
BEL	344.35	335.75	2.56%
HINDALCO	650.55	634.75	2.49%
ETERNAL	236.86	231.65	2.25%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
ASIANPAINT	2282.30	2324.60	-1.82%
CIPLA	1494.80	1520.10	-1.66%
TATAMOTORS	698.95	707.70	-1.24%
KOTAKBANK	2092.40	2115.60	-1.10%
NTPC	338.55	341.50	-0.86%

(Source: [Moneycontrol](#))

- **GAIL (India)** has received five proposals from US companies for equity stakes in their LNG projects, each tied to long-term LNG supply contracts. This initiative aims to secure 1 million tonnes per annum of LNG for 15 years, with potential extensions, targeting shipments starting in 2029-30.
- **Aditya Birla Capital** posted consolidated net profit jumped 22.11% to Rs 864.60 crore on a 13.30% rise in revenue from in Q4 FY25 as against Rs 708 crore in Q3 FY24.
- **Reliance Industries Ltd** has revived plans to sell its 4.9% stake in Asian Paints by cashing out of its 17-year-old investment in the company at a time when the sector is facing margin pressure and heightened competition, said people in the know. India's paints market worth \$9 billion has seen several new entrants seeking to topple No. 1 Asian Paints from its perch.
- **Adani Green Energy's** subsidiary Adani Renewable Energy Fifty Six has operationalised a 50 MW solar project in Gujarat.
- **Zydus Lifesciences** announced that it has received the establishment inspection report (EIR) from the United States Food and Drug Administration (USFDA) for its API manufacturing facility located in Ambarnath, Maharashtra.
- **Unichem Laboratories** said that the United States food and drug administration (USFDA) conducted an inspection at the company's Pithampur API facility in Madhya Pradesh from 24th February 2025 to 28th February 2025.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

## Global News

- Chinese banks extended CNY 280 billion in new yuan loans in April of 2025, firmly below the CNY 730 billion from the corresponding period of the previous year. Total financing grew by CNY 1.16 trillion in the period. Outstanding loan growth rose by 7.2% for a second month, and a broad measure of money supply rose by 8% annually, the sharpest increase in over one year.
- U.S. consumer price index inched up by 0.2% in April after edging down by 0.1% in March. Core consumer prices still rose by 0.2% in April after creeping up by 0.1% in March. The annual rate of growth by consumer prices slowed to 2.3% in April from 2.4% in March. The annual rate of growth by core consumer prices was unchanged from the previous month at 2.8%.
- Germany's consumer price inflation was confirmed at 2.1% in April 2025, the lowest since October 2024. On a monthly basis, consumer prices increased by 0.4%, after a 0.3% rise in the previous month.

- Germany's current account surplus widened to EUR 34.1 billion in March 2025, up from EUR 29.5 billion a year earlier.
- Japan's producer prices were up 0.2% on month in April, slowing from 0.4% in March. On a yearly basis, producer prices were up 4.0% - slowing from the upwardly revised 4.3% increase in the previous month.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

## Economic News

- Crude Oil traded at US\$ 62.99/bbl (IST 17:00).
- INR weakened to Rs. 85.39 from Rs. 85.33 against each US\$ resulting in daily change of 0.07%.
- India's wholesale prices rose by 0.85% year-on-year in April 2025, easing from a 2.05% increase in March. On a monthly basis, wholesale prices shrank 0.19%, following an upwardly revised 0.26% drop in March.
- India's coal imports witnessed a 9.2% decrease during April-February 2024-25, reaching 220.3 MT, resulting in substantial foreign exchange savings. Despite a rise in coal-based power generation, imports for blending by thermal plants significantly dropped by 38.8%. This reflects India's commitment to self-sufficiency through initiatives boosting domestic coal production, which grew by 5.45%.
- India's mobile service consumer spending increased by 5.5% sequentially in Q3FY25, reaching Rs 65,080 crore, driven by tariff hikes implemented in July 2024. This rise boosted telcos' prepaid and postpaid revenues. Data consumption patterns shifted, with 5G usage growing to 26.5% of total data, while 4G usage declined.
- India's palm oil imports declined by 24.29% in April compared to March, reaching 321,446 metric tons. Imports of soyoil increased 1.6% to 360,984 tons and sunflower oil imports fell 5.5% to 180,128 tons.
- Growth in currency in circulation is higher at 2.4% year to date up to May 2, compared with 1.7 percent in the same period a year ago, showed the latest Reserve Bank of India (RBI) data, reflecting rural demand supported by farmgate prices of agricultural commodities.
- These CPSEs and government entities have set a total capital expenditure target of Rs 7.85 lakh crore for FY26, almost unchanged from last fiscal's actual spending of Rs 8.07 lakh crore, which surpassed the revised goal of Rs 7.87 lakh crore.

(Source: [Economic Times](#), [Business Standard](#))

# Forthcoming Events

## Board Meetings as on 15/05/2025

Arvind Limited	Financial Results/Dividend
Godrej Industries Limited	Financial Results/Fund Raising
Godfrey Phillips India Limited	Financial Results/Dividend
Gujarat Mineral Development Corporation Limited	Financial Results/Dividend
ITC Hotels Limited	Financial Results
CESC Limited	Financial Results
Crompton Greaves Consumer Electricals Limited	Financial Results/Dividend
Endurance Technologies Limited	Financial Results/Dividend
JSW Energy Limited	Financial Results/Dividend/Fund Raising
Jupiter Wagons Limited	Financial Results
Kaynes Technology India Limited	Financial Results
LIC Housing Finance Limited	Financial Results/Dividend
LT Foods Limited	Financial Results/Dividend
Allcargo Gati Limited	Financial Results
Allied Blenders and Distillers Limited	Financial Results/Dividend/Fund Raising
Amrutanjan Health Care Limited	Financial Results/Dividend
Apollo Sindoori Hotels Limited	Financial Results/Dividend
Balmer Lawrie & Company Limited	Financial Results/Bonus/Dividend/Buyback
Balrampur Chini Mills Limited	Financial Results
Bikaji Foods International Limited	Financial Results/Dividend
BLS International Services Limited	Financial Results/Dividend
Bombay Burmah Trading Corporation Limited	Financial Results/Dividend
Cochin Shipyard Limited	Financial Results/Dividend
G R Infraprojects Limited	Financial Results
Garware Technical Fibres Limited	Financial Results/Dividend
Global Health Limited	Financial Results/Dividend
IFCI Limited	Financial Results
IndiGrid Infrastructure Trust	Financial Results
InfoBeans Technologies Limited	Buyback
INOX India Limited	Financial Results/Dividend
Iris Clothings Limited	Financial Results/Bonus
IRM Energy Limited	Financial Results/Dividend
IVP Limited	Financial Results/Dividend
Kopran Limited	Financial Results/Dividend
NCC Limited	Financial Results/Dividend
Neuland Laboratories Limited	Financial Results/Dividend

NOCIL Limited	Financial Results/Dividend
Orient Technologies Limited	Financial Results
P N Gadgil Jewellers Limited	Financial Results/Fund Raising
Page Industries Limited	Financial Results/Dividend
Patanjali Foods Limited	Financial Results/Dividend
PB Fintech Limited	Financial Results
Pricol Limited	Financial Results
Saregama India Limited	Financial Results
Signatureglobal (India) Limited	Financial Results
SKF India Limited	Financial Results/Dividend
Solara Active Pharma Sciences Limited	Financial Results
Spencer's Retail Limited	Financial Results
Steel Strips Wheels Limited	Financial Results/Dividend
TCI Finance Limited	Financial Results
Tega Industries Limited	Financial Results/Dividend
Thangamayil Jewellery Limited	Financial Results/Dividend
The South Indian Bank Limited	Financial Results/Dividend
Tube Investments of India Limited	Financial Results/Dividend/Fund Raising
Vinati Organics Limited	Financial Results/Dividend
Vishnu Chemicals Limited	Financial Results/Dividend
Welspun Enterprises Limited	Financial Results/Dividend/Fund Raising
Zee Learn Limited	Financial Results
ZF Commercial Vehicle Control Systems India Limited	Financial Results/Dividend

(Source: NSE)

## Corporate Actions as on 15/05/2025

BEML Limited	Interim Dividend - Rs 15 Per Share
Manappuram Finance Limited	Interim Dividend - Rs 0.50 Per Share
The Great Eastern Shipping Company Limited	Interim Dividend - Rs 5.40 Per Share

(Source: NSE)

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