



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,414.92	76,882.58	77,487.05	75,240.55	75,364.69	-2,050.23	-2.65
NIFTY 50	23,519.35	23,341.10	23,565.15	22,857.45	22,904.45	-614.90	-2.61

MARKETS PUZZLED AMID ESCALATING TARIFF WAR

Indian equity benchmark ended on a red note in the week ended 05th April, 2025. Key indices were negative in three out of four sessions of the week. The S&P BSE Sensex was down by 2,050.23 points or 2.65% to settle at 75,364.69 in the week ended 05th April, 2025. The CNX Nifty was down by 614.90 points or 2.61% to settle at 22,904.45. The BSE Mid-Cap index was down by 1,022.59 or 2.46% to settle at 40,508.53. The BSE Small-Cap index was down by 770.96 points or 1.65% to settle at 45,867.17.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TATA CONSUMER	1,087.85	1,001.90	8.58
INDUSIND BANK	682.00	649.85	4.95
BRITANNIA	5,023.40	4,936.90	1.75
APOLLO HOSPITALS	6,714.55	6,616.20	1.49
POWER GRID	293.90	290.35	1.22

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HINDALCO	599.95	682.45	-12.09
HCL TECH	1,422.10	1,592.50	-10.70
TATA MOTORS	613.85	674.45	-8.99
TATA STEEL	140.39	154.24	-8.98
TCS LTD	3,299.40	3,606.15	-8.51

MARKET STATS

Most Active (by value)

Name	Avg Value	Pr.	Qty
HDFC BANK	7,712.17	1,817.30	4,24,375.32
RELIANCE	5,732.60	1,204.70	4,75,852.56
INFOSYS LTD	5,650.40	1,451.65	3,89,239.68
ICICI BANK	4,749.63	1,335.30	3,55,697.88
TCS LTD	4,697.68	3,299.40	1,42,379.94

Most Active (by volume)

Name	Avg Value	Pr.	Qty
TATA STEEL	2,107.02	140.39	15,00,833.76
ONGC LTD	1,719.36	226.01	7,60,744.24
POWER GRID	1,992.14	293.90	6,77,828.48
BPCL	1,630.71	279.45	5,83,543.76
TATA MOTORS	3,542.83	613.85	5,77,149.04



INSTITUTIONAL NET POSITION



FII's Cash	• -13,730.49
FII's Index Future	• -6,450.35
FII's Stock Future	• -1,364.70
DII's Cash	• +5,632.56

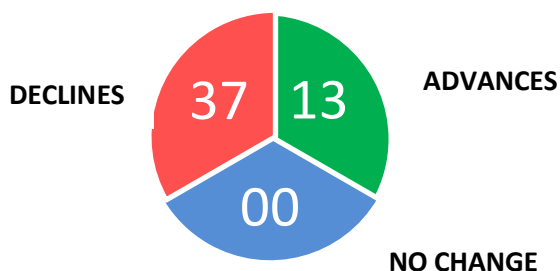
On Monday, 31 March, 2025, Indian equity markets were closed. On Tuesday, 01 April, 2025, Indian equity markets faced heavy selling pressure on the first trading session of the financial year 2025-26. Both indices, Nifty and Sensex, settled with a loss of around 1.5% each. On Wednesday, 02 April, 2025, Local equity markets ended their two-day losing streak on Wednesday. Both indices, Nifty and Sensex, closed with gains of over half a percent each ahead of the anticipated U.S. tariff announcement later in the day. On Thursday, 03 April, 2025, Local equity markets remained under pressure on Thursday, with both the Nifty and Sensex closing in negative territory amid the U.S. imposing a 27% reciprocal tariff on Indian imports. The S&P BSE Sensex was down 322.08 points or 0.42% to 76,295.36. On Friday, 05 April 2025, The S&P BSE Sensex was down 930.67 points or 1.22% to 75,364.69.

Company Name	Quantity	Trade Price
Avanti Feeds	7,24,343	778.80
Parag Milk Foods	6,03,482	180.81
Tejas Networks	17,40,479	868.55
HBL Power Systems	26,95,559	518.23
BEML	2,27,540	3,263.86
Capri Global Capital	66,57,481	173.52
BSE	13,21,387	5,365.28

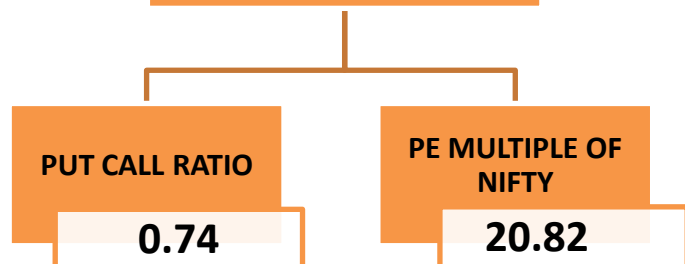


**BULK &
BLOCK**

NIFTY MARKET BREADTH (W) - NEGATIVE



RATIO ANALYSIS



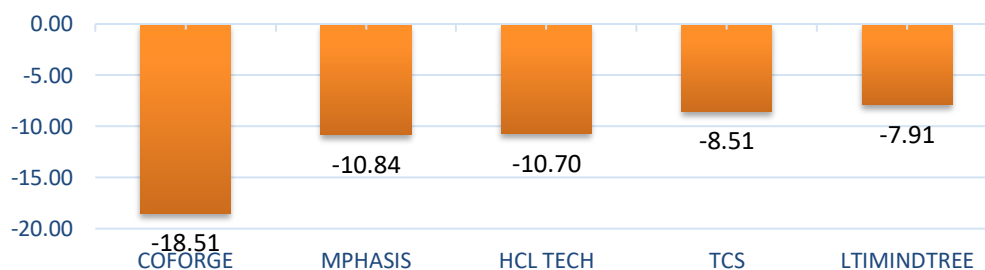


NEWS BULLETIN

- **Angel One** has reported 39.5% growth in client base to 31.02 million in March 2025 as against 22.24 million recorded in March 2024. The company's client base rose by 1.4% Month-on-Month (MoM) from 30.58 million clients in February 2025.
- **Jio Financial Services and BlackRock** have each invested Rs 63 crore in their Joint Venture (JV) namely - Jio BlackRock Asset Management (a 50:50 JV between the company and BlackRock). Both the companies have been allotted 6.30 crore equity shares of face value Rs 10 each of Jio BlackRock Asset Management. JV will utilise the amount to fund its business operations.
- **Bajaj Finance** has reported 36% rise in new loans book to 10.70 million in Q4FY25 as compared to 7.87 million in Q4FY24. Further, Assets under management (AUM) grew by 26% to around Rs 416,750 crore as of March 31, 2025 as compared to Rs 330,615 crore as of March 31, 2024. In Q4FY25, AUM grew by around Rs 18,700 crore.
- **Surya Roshni** has secured order worth Rs 116.15 crore (including GST) from GAIL India. The order is for supply of HFW 355.60 X 8. 7 & 10.3 WT, GR X-70 PSL-2, coated pipes. The order is to be executed within 39 weeks.

MAJOR DRIVING SECTORS

MARKET DRIVING SECTOR : IT



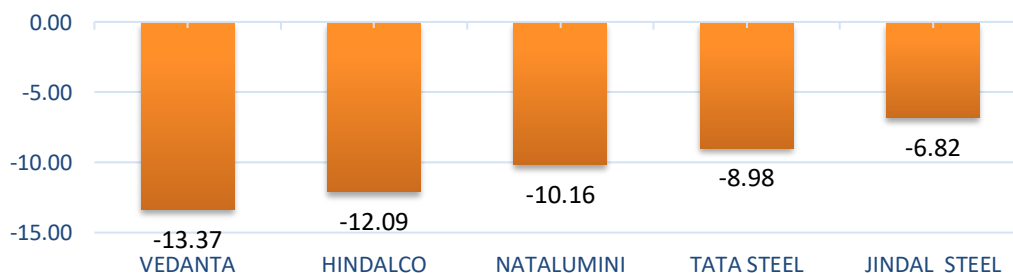
NIFTY IT

CLOSING: 33,511.40

CHANGE: - 3,374.75

CHANGE: - 9.15%

MARKET DRIVING SECTOR : METAL



NIFTY METAL

CLOSING: 8,414.45

CHANGE: - 678.05

CHANGE: - 7.46%