

April 25, 2024

Index	Up/Down	(%)	Points	Index Closing
S&P BSE SENSEX	↑	0.66	486.50	74,339.44
NIFTY 50	↑	0.75	167.95	22,570.35
S&P BSE MIDCAP	↑	0.71	290.41	41,247.11
S&P BSE SMALLCAP	↑	0.54	254.18	47,112.78
S&P BSE 500	↑	0.65	213.07	32,929.34

Index	Open	High	Low	Close	52 W High	52 W Low
SENSEX	73,572.34	74,571.25	73,556.15	74,339.44	75,124.28	60,271.49
NIFTY	22,316.90	22,625.95	22,305.25	22,570.35	22,775.70	17,885.30

SENSEX Gainers	22	NIFTY Gainers	40	Sectors Posted Gain	21
SENSEX Losers	8	NIFTY Losers	10	Sectors Posted Loss	2
Advances Declines Advance/Decline Ratio Unchanged					
BSE	2043	1769	20:17	122	
NSE	1389	1166	13:11	85	

Top 5 SENSEX Drivers				Top 5 Gainers & Losers (X – Sensex)			
Gainers	(%)	Losers	(%)	Gainers	(%)	Losers	(%)
Axis Bank	6.0	Kotak Mahindra	-10.9	Elegant Marble	20.0	Navoday Ent	-15.6
SBI	5.1	HUL	-1.3	Forbes Gokak	20.0	Avantel	-12.6
JSW Steel	2.6	Titan Company	-1.1	Megri Soft	20.0	Kotak Mahindra	-10.9
Nestle	2.4	Bajaj Finance	-0.5	Raj Oil Mills	20.0	Pankaj Polymers	-10.0
Sun Pharma	2.3	Maruti Suzuki	-0.3	Exhicon Events	18.6	Ekam Leasing	-9.5

Top 5 NIFTY Drivers				Top 5 Gainers & Losers (X – NIFTY)			
Gainers	(%)	Losers	(%)	Gainers	(%)	Losers	(%)
Axis Bank	6.0	Kotak Mahindra	-10.9	Raj Oil Mills	20.0	Kotak Mahindra	-10.9
SBI	5.1	LTIMindtree	-2.0	Lexus Granito	15.8	Glenmark Life	-9.2
Dr Reddys Labs	4.5	HUL	-1.3	Hitachi Energy	13.6	Excel Realty	-9.1
JSW Steel	2.6	Titan Company	-1.1	GPT Infra	12.5	Dalmia Bharat	-8.0
Nestle	2.5	SBI Life Insura	-1.1	Neogen	12.3	Creative Graphi	-7.6

FII/FPI/DII trading activity across Indian Exchanges – CM (Rs. In Cr.)				
Category	Date	Buy Value	Sell Value	Net Value
FII/FPI	25-Apr-24	19,378.28	22,201.61	-2,823.33
DII	25-Apr-24	19,088.02	12,920.46	6,167.56



Sectorial Contribution in SENSEX							
Index	(%)	Index	(%)	Index	(%)	Index	(%)
PSU	2.1	Auto	0.9	Infrastructure	0.8	TECK	0.4
Services	1.7	Utilities	0.9	FMCG	0.8	IT	0.3
Metal	1.2	Oil & Gas	0.9	Bankex	0.7	Consumer Discretionary	0.2
Manufacturing	1.0	Capital Goods	0.9	Financial Services	0.7	Consumer Durables	-0.5
Healthcare	1.0	Energy	0.9	Commodities	0.7	Realty	-0.1
Power	0.9	Industrials	0.9	Telecom	0.4		

Hitachi Energy shares hit 52-week high on expansion plans:

Shares of Hitachi Energy were buzzing in trade today as they soared as much as 18.89% to hit a fresh record high of Rs 9,765.30 per share, driven by expansion plans. Hitachi Energy intends to establish additional global capability centres (GCCs) in India to bolster its local operations in response to escalating energy demand and the government's focus on expanding renewable energy generation, according to Reuters. Headquartered in Zurich, Hitachi Energy specialises in manufacturing transformers and large-scale power transmitters. Venu Nuguri, the managing director and CEO of Hitachi Energy's India unit, disclosed plans to potentially establish a GCC in Hyderabad and Pune within the next six months to a year. The new GCC, designed as a cost-effective offshore facility, will operate in conjunction with Hitachi Energy India but will function as a distinct entity under Hitachi Energy in Switzerland. The precise location(s) will be determined based on demand considerations. Nuguri, however, did not disclose financial specifics regarding the investment, the report said.

Dalmia Bharat stock tanked 10%, hits 52-week low on weak Q4 results:

Shares of Dalmia Bharat hit a 52-week low of Rs 1,766.75, as they tanked 10% on the BSE in Thursday's intra-day trade in an otherwise strong market after the company reported a weak set of numbers for the March quarter (Q4FY24) with profit after tax (PAT) nearly halved to Rs 320 crore from Rs 609 crore in Q4FY23. The unexpected drop in cement prices led to EBITDA erosion during the quarter with the EBITDA margin declining from 18.1% in Q4FY23 to 15.2% in Q3FY24. Income from operations, however, grew 10% year-on-year at Rs 4,307 crore against Rs 3,915 crore in a year ago quarter. The management said, cement sector has a pivotal role in India's growth story and infrastructure, housing and private capex will drive the demand growth for the next decade and beyond. During FY24 the company delivered a volume growth of 11.8% at 28.8Mt and EBITDA growth of 13.4% at Rs 2,639 crore. The company will continue to work on gaining market share and improving realizations while deepening the cost leadership, the management said.

PSU shipbuilders sail strong; Cochin Shipyard, Mazagon Dock, others gain up to 9.6%:

The Cochin Shipyard stock jumped more than 4% to hit a fresh high of Rs 1,376.90 today extending the rally to a fifth consecutive session on higher volumes. Other shipbuilding stocks, including Mazagon Dock, Shipping Corporation and Garden Reach Shipbuilders, too, gained up to 9.6%. According to analysts, the counter has seen a stellar run as government's pushes for defence self-sufficiency with programmes like Make in India. The company has a good set of sales number and an impressive order book size. Domestic mutual funds increased stake in Cochin Shipyard in the March quarter.

Divi's Labs inks long-term supply deal, plans up to Rs 700-crore capacity addition:

Divi's Labs shares jumped 1.5% to Rs. 387. The company is in the process of entering into a long-term supply agreement with a customer and is planning for capacity addition at its manufacturing facility with an estimated investment of Rs 650-700 crore, the company said in a press statement on April 25. The investment will be funded from internal accruals. The proposed facility is expected to be operational around January 2027, the company said. Due to the confidentiality agreement signed with the customer, Divi's said that it is not permitted to disclose any further quantitative details. Divi's Laboratories had reported a 17% year-on-year (YoY) rise in its consolidated profit to Rs 358 crore for the December quarter. Revenue came in at Rs 1,855 crore, up 8.6% from the year-ago quarter of Rs 1,708 crore.



Index	CMP @ 07.21 pm	Points Up/Down	(%) Up/Down
Gold	2,334.50	-3.60	-0.15
Silver	27.26	-0.081	-0.30
Brent Crude	87.67	-0.33	-0.37
WTI Nymex Crude	82.44	-0.34	-0.41
Natural Gas	1.951	-0.025	-1.26

Index	CMP @ 07.18 pm	Points Up/Down	(%) Up/Down
Asia Pacific			
Shanghai Composite	3,052.90	8.08	0.26
GIFT NIFTY	22,525.00	-130.00	-0.57
Nikkei 225	37,628.48	-831.60	-2.21
Hang Seng	17,284.54	83.27	0.48
Europe			
FTSE 100	8,056.45	16.07	0.20
DAX	17,857.04	-231.66	-1.28
CAC	7,977.78	-114.08	-1.41
America			
Dow Jones	37,881.76	-579.16	-1.51
S&P 500	5,004.77	-66.86	-1.32
Nasdaq Composite	15,420.26	-292.49	-1.86

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Sunidhi Securities & Finance Ltd. – Research Analyst – INH000001329

Kalpataru Inspire, Unit.1, 8th floor, Opp. Grand Hyatt Hotel, Santacruz East, Mumbai-400055

Bombay Stock Exchange (BSE)	National Stock Exchange of India Ltd (NSE)	Metropolitan Stock Exchange of India Limited (MSEI)
Registration no. INZ000169235	Registration no. INZ000169235	Registration no. INZ000169235
Compliance Officer Name:	Mr. Mahesh Desai	Phone No: 9122-66771777