

April 23, 2024

| Index            | Up/Down | (%)  | Points | Index Closing |
|------------------|---------|------|--------|---------------|
| S&P BSE SENSEX   | ↑       | 0.12 | 89.83  | 73,738.45     |
| NIFTY 50         | ↑       | 0.14 | 31.60  | 22,368.00     |
| S&P BSE MIDCAP   | ↑       | 0.52 | 209.32 | 40,584.17     |
| S&P BSE SMALLCAP | ↑       | 1.05 | 484.01 | 46,492.21     |
| S&P BSE 500      | ↑       | 0.31 | 99.62  | 32,589.50     |

| Index  | Open      | High      | Low       | Close     | 52 W High | 52 W Low  |
|--------|-----------|-----------|-----------|-----------|-----------|-----------|
| SENSEX | 74,048.94 | 74,059.89 | 73,688.31 | 73,738.45 | 75,124.28 | 59,954.91 |
| NIFTY  | 22,447.05 | 22,447.55 | 22,349.45 | 22,368.00 | 22,775.70 | 17,885.30 |

|  |      |               |       |                     |    |
|--|------|---------------|-------|---------------------|----|
| SENSEX Gainers   | 18   | NIFTY Gainers | 30    | Sectors Posted Gain | 17 |
| SENSEX Losers  | 12   | NIFTY Losers  | 20    | Sectors Posted Loss | 5  |
| <b>Advances Declines Advance/Decline Ratio Unchanged</b> |      |               |       |                     |    |
| BSE  | 2314 | 1512          | 23:15 | 108                 |    |
| NSE  | 1572 | 997           | 5:3   | 85                  |    |

| Top 5 SENSEX Drivers |     |               |      | Top 5 Gainers & Losers (X – Sensex) |      |                 |       |
|----------------------|-----|---------------|------|-------------------------------------|------|-----------------|-------|
| Gainers              | (%) | Losers        | (%)  | Gainers                             | (%)  | Losers          | (%)   |
| Bharti Airtel        | 3.4 | Sun Pharma    | -3.6 | Oriental Aromat                     | 20.0 | Supershakti Met | -13.0 |
| Nestle               | 1.8 | Reliance      | -1.4 | Mangalam Organ                      | 20.0 | HEUBACHIND      | -11.5 |
| Maruti Suzuki        | 1.5 | M&M           | -1.0 | Tejas Networks                      | 20.0 | Shree Bhavya    | -10.0 |
| HCL Tech             | 1.4 | Tech Mahindra | -0.6 | Shanti Spintex                      | 20.0 | K M Sugar Mills | -10.0 |
| Tata Motors          | 1.3 | Tata steel    | -0.5 | Umang Diaries                       | 20.0 | Atal            | -10.0 |

| Top 5 NIFTY Drivers |     |            |      | Top 5 Gainers & Losers (X – NIFTY) |      |                 |       |
|---------------------|-----|------------|------|------------------------------------|------|-----------------|-------|
| Gainers             | (%) | Losers     | (%)  | Gainers                            | (%)  | Losers          | (%)   |
| Grasim              | 3.9 | Sun Pharma | -3.6 | Tejas Networks                     | 20.0 | Aster DM Health | -22.2 |
| Bharti Airtel       | 3.4 | BPCL       | -1.7 | Smartlink Net                      | 20.0 | Tembo Global    | -10.8 |
| Nestle              | 1.7 | Reliance   | -1.4 | Oriental Aromat                    | 20.0 | HEUBACHIND      | -10.7 |
| Maruti Suzuki       | 1.6 | M&M        | -1.3 | Tac Infosec                        | 20.0 | Atal            | -9.9  |
| HCL Tech            | 1.4 | Hindalco   | -1.1 | Inspire Films                      | 19.9 | K M Sugar Mills | -9.9  |

| FII/FPI/DII trading activity across Indian Exchanges – CM (Rs. In Cr.) |           |           |            |           |
|--|-----------|-----------|------------|-----------|
| Category   | Date      | Buy Value | Sell Value | Net Value |
| FII/FPI  | 23-Apr-24 | 14,931.47 | 17,976.01  | -3,044.54 |
| DII  | 23-Apr-24 | 12,337.81 | 9,418.87   | 2,918.94  |



| Sectorial Contribution in SENSEX |     |                        |     |                    |     |               |      |
|----------------------------------|-----|------------------------|-----|--------------------|-----|---------------|------|
| Index                            | (%) | Index                  | (%) | Index              | (%) | Index         | (%)  |
| Telecom                          | 4.3 | FMCG                   | 0.8 | IT                 | 0.4 | Energy        | -0.8 |
| Realty                           | 2.4 | Consumer Discretionary | 0.8 | PSU                | 0.3 | Oil & Gas     | -0.6 |
| TEcK                             | 1.2 | Power                  | 0.6 | Services           | 0.2 | Healthcare    | -0.6 |
| Infrastructure                   | 1.0 | Industrials            | 0.6 | Bankex             | 0.2 | Metal         | -0.4 |
| Utilities                        | 1.0 | Commodities            | 0.5 | Financial Services | 0.2 | Manufacturing | -0.1 |
| Consumer Durables                | 0.8 | Auto                   | 0.5 | Capital Goods      | 0.2 |               |      |

#### Hatsun Agro zoomed 14.7% on healthy Q4 numbers; profits rise by 108% YoY:

Shares of Hatsun Agro Product (HAP) shot up by 14.76% at Rs 1,135 in today's intraday trade. The hike in the stock price came after a strong show by the company in its quarter four results for Q4FY24. On Monday, the dairy company reported revenue from operations in Q4FY24 at Rs 2,046 crore as against Rs 1,789 crore in Q4FY23 registering a growth of 14.38% Y-o-Y. It recorded Ebitda at Rs 231 crore in Q4FY24 as against Rs158 crores in Q4FY23, a growth of 46.64%. The company's net profits rose by 108% Y-o-Y to Rs 52 crores in the March quarter versus Rs 25 crore in the same quarter in the previous year. The company in a statement said that its procurement of milk registered a growth of 39.04% in FY24 over FY23. On a full-year basis, the company's revenues from operations recorded a jump of 10.26% Y-o-Y to Rs 7,990 crore in FY24 as against Rs 7,246 crore in FY23. The net profits also soared by 61% to Rs 267 crore in FY24 versus Rs 165 crore in FY23. "HAP in the last financial year, had invested about Rs.550 crores across new manufacturing facilities for capacity expansion in Curd and Milk Products and in market assets. The new capacities will further support our sales plans for FY 2024-25. Considerable investments have also been made to strengthen distribution, sales and marketing of our brands," the management said.

#### Amara Raja jumped 15% so far in April, nears record high on healthy outlook:

Shares of Amara Raja Energy (ARE&M) hit a multi-year high of Rs 1,199.35, as they rallied 15% on a healthy outlook. A sharp upward movement saw after South Korean automotive majors Hyundai Motor Company and Kia Corporation announced a partnership with Exide Energy Solutions (EESL), a subsidiary of battery manufacturer Exide Industries, to localise electric vehicle (EV) battery production in India. ARE&M encompasses a diverse range of solutions and products, which include energy storage solutions, Lithium-ion cell manufacturing, wide range of EV chargers, Lithium-Ion battery pack assembly, automotive and industrial lubricants, and exploration of new chemistries, among others. The company is also one of the largest manufacturers of energy storage products for both industrial and automotive applications in India.

#### Inox Wind stock zoomed 9% on bonus issue plan:

Wind energy manufacturer Inox Wind shares jumped as much as 8.93% to hit an intraday high of Rs 645.75 today. This comes after the company announced that its board of directors will meet on April 25, to consider and approve the proposal for issuance of bonus equity shares to the shareholders of the company. In an exchange filing, Inox Wind said, "We would like to inform you that a meeting of the Board of Directors of the company is scheduled to be held on Thursday, April 25, 2024, inter-alia, to consider and approve the proposal for issuance of bonus equity shares to the shareholders of the company."

#### Tejas Network zooms 20% to 52-week high on stellar Q4 score:

Shares of Tejas Networks zoomed 20% today to hit a 52-week high of Rs 1086.90, a day after the company reported robust earnings for the quarter ended March 2024 with margins and revenue beating the Street estimates. The company's consolidated net profit came in at Rs 146.78 for the quarter, compared to a loss of Rs 11.47 crore a year ago period, led by BSNL's 4G project execution. The telecom equipment company saw growth in all product segments led by the wireless business. Tejas benefitted from the government push for local manufacturing and the PLI scheme, large spends on BSNL, BharatNet, and the railways. References from TCom and TCS too helped the company add new clients. The global move towards replacing Chinese telecom equipment also helped it deliver robust numbers in Q4FY24. Tejas Networks said it received Rs 32.66 crore incentive in FY23 under the PLI scheme for telecom and networking products. Its EBITA surged 669% on year to Rs 248 crore in the January-March quarter and its order book stood at Rs 8,221 crore by the end of Q4.



| Index           | CMP @ 07.05 pm | Points Up/Down | (%) Up/Down |
|-----------------|----------------|----------------|-------------|
| Gold            | 2,326.80       | -19.60         | -0.84       |
| Silver          | 27.07          | -0.175         | -0.64       |
| Brent Crude     | 86.54          | -0.46          | -0.53       |
| WTI Nymex Crude | 81.47          | -0.43          | -0.53       |
| Natural Gas     | 1.767          | -0.024         | -1.34       |

| Index               | CMP @ 07.02 pm | Points Up/Down | (%) Up/Down |
|---------------------|----------------|----------------|-------------|
| <b>Asia Pacific</b> |                |                |             |
| Shanghai Composite  | 3,021.98       | -22.62         | -0.75       |
| GIFT NIFTY          | 22,365.00      | -11.50         | -0.05       |
| Nikkei 225          | 37,552.16      | 113.55         | 0.30        |
| Hang Seng           | 16,828.93      | 317.24         | 1.89        |
| <b>Europe</b>       |                |                |             |
| FTSE 100            | 8,037.38       | 13.51          | 0.17        |
| DAX                 | 18,059.34      | 198.54         | 1.11        |
| CAC                 | 8,083.49       | 43.13          | 0.54        |
| <b>America</b>      |                |                |             |
| Dow Jones           | 38,364.37      | 124.39         | 0.33        |
| S&P 500             | 5,006.71       | 39.48          | 0.79        |
| Nasdaq Composite    | 15,434.90      | 152.89         | 1.00        |

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