

Indices	Current Value	% 1 D	% YTD
Sensex	77,289	-0.9	-1.1
Nifty	23,487	-0.8	-0.7
BSE Midcap	41,625	-0.7	-10.4
BSE Small cap	46,386	-1.5	-15.9

Sectors – Performance (BSE)

Capital Goods	62,500	0.1	-7.8
Auto	48,704	-0.1	-5.7
Consumer Dur	54,345	-0.3	-15.7
Oil & Gas	24,727	-1.5	-5.1
Realty	6,606	-1.4	-19.8
Healthcare	41,423	-1.4	-8.5

Nifty Gainers/Losers	CMP	% Chg
INDUSINDBK	655	2.9
TRENT	5,322	2.6
HCLTECH	1,633	0.5
NTPC	355	(3.4)
TECHM	1,416	(2.7)
CIPLA	1,476	(2.3)

FII Trading activities in Cash

	Date	Net	MTD
FII	26-Mar-25	2,241	7,612
DII	26-Mar-25	-696	-3,465

Figs. in Rs Cr.

Global Indices	Current Value	% 1 D	% YTD
Dow Jones	42,455	(0.3)	(0.2)
Nasdaq	17,899	(2.0)	(7.3)
DAX	22,839	(1.2)	14.7
Nikkei 225	37,582	(1.2)	(5.8)
FTSE 100	8,690	0.3	6.3
Hang Seng	23,414	(0.3)	16.7
Shanghai	3,354	(0.4)	0.1

Forex Rate

INR/USD	85.7	0.1	-0.1
INR/EUR	92.5	0.1	-3.6
INR/GBP	110.7	0.2	-2.9
INR/YEN (100)	57.0	0.3	-4.1

Source: Bloomberg

Market Commentary

- **Asian markets** are trading mixed as investors weigh U.S. President Donald Trump's 25% tariffs on auto imports. Nikkei and Shanghai are trading lower by 1.09% and 0.3%, respectively, whereas Hang Seng is trading higher by 0.35%.
- **Indian indices** are expected to open in the red, with GIFT Nifty trading at 23,509, lower than the Nifty Futures close of 23,522.
- **US markets** closed negative as pressure on the tariff front mounted. Dow Jones ended lower by 133 points or 0.31% to close at 42,455, while Nasdaq declined by 373 points or 2.04% to close at 17,899.

News in Focus

- **Wipro:** The technology services and consulting company has won a 500 Mn pound, 10-year strategic deal with Phoenix Group, the UK's largest long-term savings and retirement business
- **UPL:** Alpha Wave Ventures II, LP has invested \$100 Mn for a 3.51% stake in Advanta Enterprises through a primary investment. The company sold an 8.93% stake (following its primary investment) in Advanta Enterprises to Alpha Wave for \$250 Mn.
- **Torrent Power:** The company sold equity shares of its 10 subsidiaries for Rs 474.26 Cr to its wholly owned subsidiary company - Torrent Green Energy.
- **Indian Hotels Company:** The company has infused \$9 Mn as equity in IHOCO BV, its wholly owned subsidiary in the Netherlands. The investment amount will be used by IHOCO BV to further invest in its subsidiary United Overseas Holding Inc. in the USA to repay its debt and for other operational purposes.
- **Bharat Forge:** The Ministry of Defence has signed contracts worth Rs 6,900 Cr with Bharat Forge and Tata Advanced Systems for the procurement of 155mm/52 calibre advanced towed artillery gun systems (ATAGS) and high-mobility vehicle 6x6 gun towing vehicles, respectively.
- **Sterlite Technologies:** The optical and digital solutions company announced its partnership with Wyre to support the development of its expansive multigigabit fibre-to-the-home (FTTH) network in Belgium.
- **Vedanta:** The Board has approved the appointment of Rajiv Kumar as CEO - Aluminium Business and has designated him as Senior Management Personnel at Vedanta, for three years, effective March 26. He joins Vedanta Aluminium from Tata Steel.

Axis Intellect: Intraday Stocks for the week 24th March 2025 to 30th March 2025

Name of Stock	Mcap	Sector
ALLCARGO LOGISTICS LTD	Transport	Small Cap
METRO BRANDS LIMITED	Discretionary	Mid Cap
NARAYANA HRUDAYALAYA LIMITED	Healthcare	Mid Cap
LIFE INSURANCE CORPORATION OF INDIA	NBFC	Large Cap
INFOSYS LTD	IT	Large Cap
VIJAYA DIAGNOSTIC CENTRE LIMITED	Healthcare	Small Cap
ONE 97 COMMUNICATIONS LIMITED	IT	Mid Cap
DALMIA BHARAT LIMITED	Build Mate	Mid Cap
CSB BANK LIMITED	Banks	Small Cap
CARBORUNDUM UNIVERSAL LTD.,	Industrials	Small Cap

Investment Picks

Company	Recommendation	CMP	Target Price	% Upside
Aarti Drugs Ltd	BUY	333	470	41.0
Aarti Industries Ltd	BUY	389	525	35.0
ACC Ltd	BUY	1,937	2,380	22.9
Ambuja Cements Ltd	BUY	529	655	23.8
Apcotex Industries Ltd	BUY	315	380	20.6
APL Apollo Tubes Ltd	BUY	1,494	1,750	17.1
Aptus Value Housing Finance India Ltd	BUY	300	400	33.4
Arvind Smartspaces Ltd	BUY	700	1,005	43.6
Ashok Leyland Ltd	BUY	214	245	14.3
AU Small Finance Bank Ltd	BUY	575	700	21.8
Aurobindo Pharma Ltd	BUY	1,156	1,500	29.7
Automotive Axles Ltd	BUY	1,691	1,975	16.8
Bajaj Auto Ltd	BUY	7,969	9,380	17.7
Bandhan Bank Ltd	BUY	148	170	14.5
Bank of Baroda Ltd	BUY	220	280	27.4
Biocon Ltd	BUY	349	405	16.0
Birla Corporation Ltd	BUY	1,066	1,340	25.7
Can Fin Homes Ltd	BUY	667	840	26.0
CCL Products (India) Ltd	BUY	552	730	32.2
Chalet Hotels Ltd.	BUY	850	1,075	26.5
CIE Automotive India Ltd	BUY	406	520	28.1
Cipla Ltd	BUY	1,474	1,700	15.4
City Union Bank Ltd	BUY	158	215	36.2
Coal India Ltd	BUY	394	440	11.7
Dabur India Ltd	BUY	509	610	19.9
Dalmia Bharat Ltd	BUY	1,755	2,180	24.2
DCB Bank Ltd	BUY	111	140	25.8
Dhanuka Agritech Ltd	BUY	1,328	1,780	34.0
DOMS Industries Ltd	BUY	2,791	3,080	10.4
Dr Reddys Laboratories Ltd	BUY	1,161	1,450	24.8
Embassy Office Parks REIT	BUY	363	405	11.4
Ethos Ltd	BUY	2,467	3,070	24.4
Federal Bank Ltd	BUY	193	225	16.6
Fortis Healthcare Ltd	BUY	644	860	33.5
G R Infraprojects Ltd	BUY	1,024	1,430	39.6
Genus Power Infrastructures Ltd	BUY	266	380	42.8
Gravita India Ltd	BUY	1,778	3,000	68.8
H. G. Infra Engineering Ltd	BUY	1,058	1,720	62.6
HCL Technologies Ltd	BUY	1,626	2,175	33.8
HDFC Bank Ltd	BUY	1,803	2,000	10.9
HealthCare Global Enterprises Ltd	BUY	516	575	11.4
Hero MotoCorp Ltd	BUY	3,653	5,285	44.7
ICICI Bank Ltd	BUY	1,335	1,500	12.3
Indian Hotels Company Ltd	BUY	808	950	17.6
Inox Wind Ltd	BUY	160	250	56.3
ITC Ltd	BUY	407	510	25.2
J K Cements Ltd	BUY	4,750	5,380	13.3
J.Kumar Infraprojects Ltd	BUY	653	940	44.0
JK Lakshmi Cement Ltd	BUY	778	930	19.5
JSW Energy Ltd.	BUY	551	770	39.7
JTL Industries Ltd	BUY	77	115	49.4
Juniper Hotels Ltd.	BUY	262	360	37.5

Investment Picks

Company	Recommendation	CMP	Target Price	% Upside
Jyothy Labs Ltd	BUY	325	450	38.5
K E C International Ltd	BUY	760	1,040	36.9
Kalpataru Projects International Ltd.	BUY	1,001	1,350	34.9
Karnataka Bank Ltd	BUY	178	255	43.7
Kirloskar Brothers Ltd	BUY	1,695	2,100	23.9
KPIT Technologies Ltd	BUY	1,363	1,850	35.7
Krishna Institute of Medical Sciences Ltd	BUY	616	710	15.3
Lupin Ltd	BUY	2,054	2,500	21.7
Man Infraconstruction Ltd.	BUY	147	260	76.9
MAS Financial Services Ltd	BUY	255	325	27.3
Max Healthcare Institute	BUY	1,124	1,315	17.0
Mold-Tek Packaging Ltd	BUY	424	600	41.5
National Aluminium Co	BUY	179	220	23.0
Nestle India Ltd	BUY	2,240	2,520	12.5
Nippon Life India Asset Management Ltd	BUY	587	800	36.3
NLC India Ltd	BUY	243	305	25.5
NTPC Ltd	BUY	354	390	10.2
Oberoi-Realty-Ltd	BUY	1,618	2,560	58.2
P I Industries Ltd	BUY	3,434	4,265	24.2
Pitti Engineering Ltd	BUY	1,000	1,340	34.0
PNC Infratech Ltd	BUY	261	330	26.5
Prestige Estates Projects Ltd	BUY	1,191	1,820	52.8
Rites Ltd	BUY	233	305	30.7
Sansera Engineering Ltd	BUY	1,219	1,430	17.3
SBI Life Insurance Company Ltd	BUY	1,545	1,850	19.7
Signatureglobal (India) Ltd	BUY	1,136	1,645	44.8
Skipper Ltd	BUY	452	570	26.0
Star Cement Ltd	BUY	214	235	10.1
State Bank of India	BUY	763	1,025	34.4
Steel Authority Of India Ltd	BUY	113	130	14.9
Steel Strips Wheels Ltd	BUY	188	265	41.3
Trent Ltd	BUY	5,308	7,100	33.8
Ujjivan Small Finance Bank Ltd	BUY	35	39	12.1
UltraTech Cement Ltd	BUY	11,401	13,510	18.5
UNO Minda Industries Ltd	BUY	936	1,140	21.8
V Mart Retail Ltd	BUY	2,880	4,370	51.7
VA Tech Wabag Ltd.	BUY	1,471	1,970	33.9
Varun Beverages Ltd	BUY	529	710	34.3
Welspun Living Ltd	BUY	135	165	22.2
Westlife Foodworld Ltd	BUY	692	870	25.8
Zomato Ltd	BUY	204	280	36.9

Trading Insights

Insight from trading volumes

Script	CMP	Total Volume (x1000)	Monthly Avg Volume(x1000)	% Change
ASIAN PAINTS LTD	2,323	2,056	1,275	61.3%
DR. REDDY'S LABORATORIES	1,165	3,225	2,245	43.6%
MARUTI SUZUKI INDIA LTD	11,734	495	358	38.2%
BRITANNIA INDUSTRIES LTD	4,850	461	347	32.9%
NTPC LTD	355	19,756	15,096	30.9%
POWER GRID CORP OF INDIA LTD	291	20,929	16,370	27.8%
BAJAJ FINSERV LTD	1,943	2,869	2,456	16.8%

Insight from delivery

Script	CMP	Total Delivery Volume(x1000)	Monthly Avg Delivery Volume(x1000)	%Change
ASIAN PAINTS LTD	2,323	1,367	770	77.4%
MARUTI SUZUKI INDIA LTD	11,734	327	208	57.0%
BRITANNIA INDUSTRIES LTD	4,850	280	196	43.1%
NTPC LTD	355	12,392	9,247	34.0%
DR. REDDY'S LABORATORIES	1,165	1,912	1,454	31.5%
INDUSIND BANK LTD	655	10,679	8,200	30.2%
GAIL INDIA LTD	174	9,653	7,500	28.7%

*CMP-Closing Market Price

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