

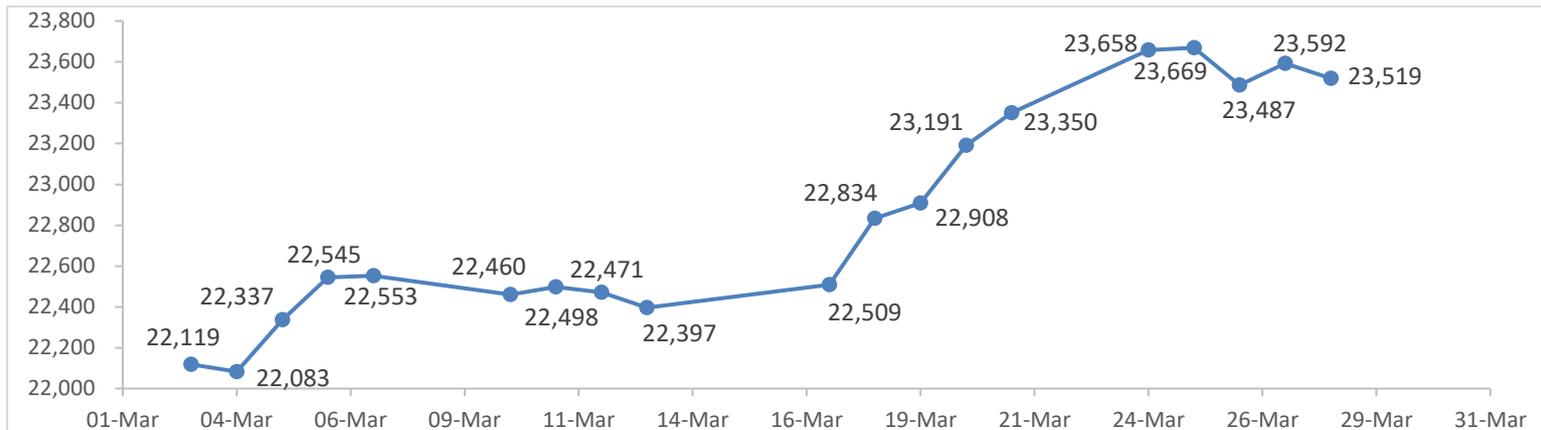
### Nifty 50

23519.35 **72.60**  
(-0.31%)

52 Week High: 26,277.4

52 Week Low: 21,281.4

Resistance		Support	
R1	23,845.56	S1	22,390.14
R2	24,295.14	S2	21,940.56
R3	25,022.85	S3	21,212.85



Sectorial Indices	Prev. Close (28-Feb'25)	Close (28-Mar'25)	% Change (1M)
Nifty Auto	20,499	21,296	3.9%
Nifty PSU Bank	5,652	6,263	10.8%
Nifty Pharma	19,814	21,137	6.7%
Nifty IT	37,318	36,886	-1.2%
Nifty FMCG	50,689	53,590	5.7%
Nifty Metal	8,219	9,093	10.6%
Nifty Fin Serv	23,029	25,075	8.88%
Nifty Cons	34,459	35,652.20	3.5%

Global Indices	Prev. Close (28-Feb'25)	Close (28-Mar'25)	% Change (1M)
Dow Jones	43,240	42,300	-2.2%
Nasdaq	18,544	17,804	-4.0%
FTSE	8,756	8,681	-0.9%
Hang Seng	22,941	23,427	2.1%
USD/INR	87	85	-2.3%
GBP/INR	110	111	0.5%

Net Flow	Amount (Rs Cr)	Index	Prev. Close (28-Feb'25)	Close (28-Mar'25)	% Change (1M)
FII	2,014.18	SENSEX	73,198	77,415	5.8%
DII	37,585.68	NIFTY 50	22,125	23,519	6.3%
MF Equity	8,494.14	BANK NIFTY	48,345	51,565	6.7%
MF Debt	69,986.02				

Top Gainers	Prev. Close (28-Feb'25)	Close (28-Mar'25)	% Change (1M)
PTC INDUSTRIES	10,205	14,998	47.0%
HAL	3,088	4,493	45.5%
JSW HOLDINGS	16,364	23,162	41.5%
ZENTEC	1,045	1,488	42.4%
GODFRYPHLP	5,189	7,080	36.4%

Top Losers	Prev. Close (28-Feb'25)	Close (28-Mar'25)	% Change (1M)
INDUSINDBK	990	647	-34.6%
IKS	1,795	1,505	-16.1%
HAPPSTMNDS	686	590	-14.0%
IOB	44	38	-12.9%
CAMPUS	261	229	-12.2%

Commodities	Prev. Close (28-Feb'25)	Close (28-Mar'25)	% Change (1M)
Gold	84,219	93,966	5.8%
Silver	94,328	94,937	-6.5%
Crude (WTI)	70	60	-16.7%

Contact us :

+91 22 6932 1000

+91 97 6932 1000

www.endovia.in



Diamond Business Partner  
Authorized Person

Motilal Oswal Financial Services Ltd.

Reach us :

809, Neelkanth Corporate Park,  
Kiroli Road, Vidyavihar (West)  
Mumbai-400 086

## Federal Reserve Holds Rates Steady, Signals Possible Cuts:

The Federal Reserve kept interest rates unchanged but signaled possible cuts later this year amid slowing inflation and economic growth concerns. Fed Chair Jerome Powell noted signs of a cooling labor market and moderated consumer spending. Investors reacted positively to the news, fueling a stock market rally that pushed the S&P 500 and Nasdaq to record highs, while bond yields dropped as investors anticipated policy easing. This news has driven a rally in equity markets, particularly in tech and consumer discretionary stocks. Analysts expect a rate cut as early as June, depending on economic data.

## Rupee Weakens Marginally Amid Month-End Dollar Demand:

The Indian rupee weakened to 85.78 per U.S. dollar on March 27, down from 85.71/\$1, as month-end dollar demand from oil companies pressured the currency. The rupee traded within a narrow range of 85.73/\$1 to 85.91/\$1 during the session, according to LSEG data. Traders observed mild dollar sales from importers and oil companies, offering slight relief. The dollar index stood at 104.4, reflecting global currency trends. Investors remain cautious ahead of the April 2 U.S. tariff announcement, with uncertainty over reciprocal measures adding to volatility.

## IndusInd Bank Under SEBI Lens: Insider Trading Shock?:

IndusInd Bank is under regulatory scrutiny after reports of insider trading surfaced. The Securities and Exchange Board of India (SEBI) has launched an investigation into alleged stock transactions by senior executives before key financial disclosures. The inquiry focuses on five executives' trades while holding sensitive information. IndusInd's late disclosure of a ₹1,500-crore loss significantly impacted its stock value. The regulator is also investigating if IndusInd Bank violated its disclosure norms in light of these findings.

## Trump's Tariff Hike Shakes Auto Industry:

The U.S. auto industry is facing turbulence as former President Donald Trump proposes a 100% tariff on Chinese electric vehicles (EVs) and a 25% tariff on all imported cars and auto parts. The move, aimed at boosting domestic manufacturing, has raised concerns over rising vehicle costs and supply chain disruptions. The impact extended to global markets, including India, where the auto sector saw a decline of up to 3.8% as investors feared disruptions in supply chains and higher import costs for components.

## Banks to Hike ATM Charges Amid Rising Costs:

Indian banks are set to increase ATM withdrawal charges, citing higher operational expenses. According to reports, customers will now have to pay an additional Rs 2 per transaction once they exceed their free withdrawal limit. The non-transaction fee has also been raised by Rs 1. As per the new charges, withdrawing cash from an ATM will now cost Rs 19 per transaction, up from Rs 17. Experts warn that higher ATM charges may push customers toward digital transactions and UPI payments, reducing ATM dependency.

## Asian Markets Plunge on Trade War Fears:

Asian stock markets have experienced significant declines recently, primarily due to escalating trade tensions and fears of a global recession. President Donald Trump's announcement of forthcoming reciprocal tariffs, referred to as "Liberation Day," has intensified concerns about a potential trade war. Nikkei 225 dropped 4%, KOSPI declined 2.5%, and Hang Seng slid 1.7%. Rising trade tensions continue to rattle global markets, increasing volatility. Analysts warn of further declines if the situation escalates.

Contact us :

+91 22 6932 1000

+91 97 6932 1000

www.endovia.in



Diamond Business Partner

Authorized Person

Motilal Oswal Financial Services Ltd.

Reach us :

809, Neelkanth Corporate Park,  
Kiroli Road, Vidyavihar (West)  
Mumbai-400 086

**Endovia Family Office**

*Our Mission is your Financial Well Being!*

A Boutique Wealth Management and Family Office working towards your continual financial well-being in the present and the future

Comprehensive Engagement Platform where we act as your Family's Personal CFO, managing all aspects of your family's financial well-being ranging from Investment management, Cash flow with Goal setting, Performance reporting, Global Portfolios, Insurance Solutions, Real Estate Advisory, Custody solutions, Booking Keeping, Tax Solutions, Legal, Succession Planning, Philanthropy etc.

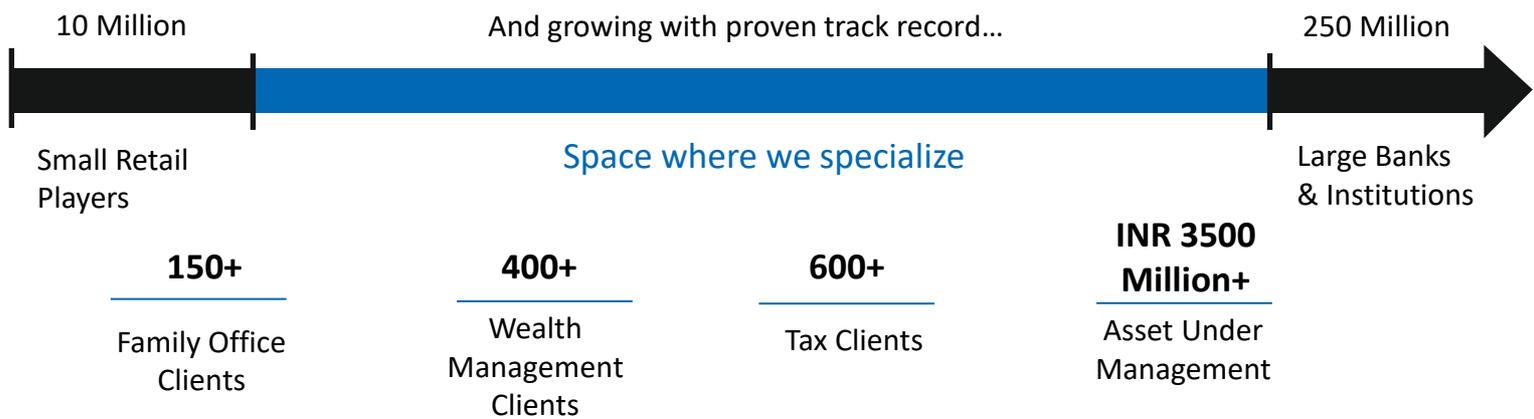
**We Deliver Custom Investing Strategies  
Optimize Risk And Return On Your Behalf**

Endovia Family Office brings to you the benefits of synergic interaction with the best market forces creating a combined effect that is greater than the sum of its parts



With the Endovia and Motilal Oswal partnership clients get the best financial insights tailored specially for them with easy to use and transparent systems at your easy disposal

Small Outfits are unable to provide desired services and large players do not cater to this segment...



Contact us :

- +91 22 6932 1000
- +91 97 6932 1000
- www.endovia.in



Motilal Oswal Financial Services Ltd.

*Disclaimer: Investments are subject to market risk, this is for knowledge purpose only.*

Reach us :

809, Neelkanth Corporate Park,  
Kiroil Road, Vidyavihar (West)  
Mumbai-400 086