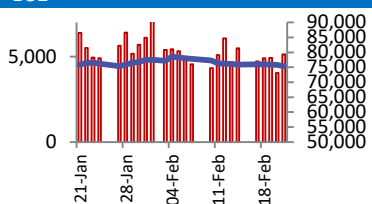
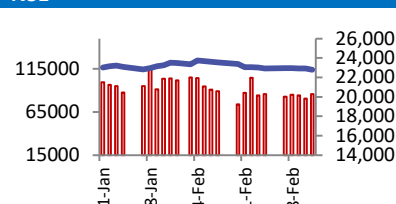


**BSE**



Open	75613
High	75749
Low	75112
Close	75311
Change	-425
Volume (Lacs)	4690
Turnover (Rs.inCr)	5126

**NSE**



Open	22857
High	22921
Low	22720
Close	22796
Change	-117
Volume(Lacs)	28113
Turnover(Rs.in Cr)	85628

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	43428	44177	(749)	-1.7%
Dow Futures	43679	43486	193	0.4%
Nasdaq	19524	19962	(438)	-2.2%
FTSE	8659	8663	(4)	0.0%
Nikkei	38777	38777	Closed	Closed
Hang Seng	23533	23478	55	0.2%
Gift Nifty	22711	22618	94	0.4%
Straits Singapore	3948	3930	18	0.5%
South Korea	2636	2655	(19)	-0.7%
Taiwan	23520	23730	(210)	-0.9%
Shanghai	3382	3379	3	0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9559	9564	(5)	0.0%
Alumin (\$/MT)	2688	2728	(40)	-1.4%
Zinc (\$/MT)	2928	2919	10	0.3%
Brent Crude (\$/bbl)	74	74	0	0.0%
Gold (\$/Ounce)	2942	2936	6	0.2%
Silver (\$/Ounce)	33	32	0	0.8%
Light Crude (\$/bbl)	70	70	(0)	-0.1%
N G (\$/mmbtu)	4	4	(0)	-4.5%
Sugar (\$/MT)	560	555	5	0.9%
Rubber (Rs./kg)	191	191	0	0.0%
Baltic Dry Index	981	941	40	4.3%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	86.71	86.66	0.05%
Rs./ Euro	90.78	90.45	0.37%
Rs./Chinese Yuan	11.95	11.94	0.15%
Yen / \$ rate	149.27	149.27	0.00%
\$ US/Euro	1.05	1.05	0.62%

Dollar Index	Current	Previous	Var(%)
Dollar Index	106.18	106.61	-0.41%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22700	48770
Support 2	22640	48540
Resistance	22870	49340

Securities in Ban For Trade	
CHAMBLFERT	MANAPPURAM

**Market Review**

**US:** US stocks crashed in their worst session in 2025 so far as investors were spooked by weak economic data and weakest consumer sentiment on inflation since 1995 on Friday.

**Asia:** Asia-Pacific markets were trading mixed on Monday after starting on the backfoot, following Wall Street's worst session of the year last Friday. US markets fell on lackluster economic data that pointed to a slowing economy and sticky inflation.

**India:** On Friday, the domestic equity market ended lower for the fourth consecutive session, with the benchmark Nifty 50 slipping below 22,800 level. **Market is expected to open on a gap down note and likely to witness range bound move during the day.**

**Global economy:** Canada's retail sales in December grew by a robust 2.5% on a monthly basis, beating analysts' expectations, as a sales tax holiday bumped up spending on food and beverages and people also bought cars and vehicle parts, data showed on Friday.

The U.S. housing market showed signs of cooling off as existing home sales dipped in the latest economic report. The actual number of annualized sales of existing residential buildings came in at 4.08 million, according to the data. This figure failed to meet the market forecast, which had predicted a less severe drop to 4.13 million. The actual number of existing home sales not only fell short of these expectations but also represented a decline from the previous month's figure of 4.29 million.

**Commodities:** Oil prices dropped this Monday, influenced by the potential resumption of exports from Kurdistan's oilfields and anticipation of Russia-Ukraine peace talks. Brent crude fell to \$74.23 per barrel, and U.S. West Texas Intermediate decreased to \$70.12. Iraq plans to export 185,000 barrels daily via the Iraq-Turkey pipeline.

Gold prices hovered near a historic peak, driven by U.S. President Trump's tariff plans and attention on an upcoming U.S. inflation report. The Federal Reserve's interest rate trajectory is in focus as markets await the PCE index for further insights.

**Currency:** The euro strengthened after Germany's Friedrich Merz won the national election, but faces long coalition talks. The dollar fell due to concerns over U.S. economic growth and upcoming data releases.

FII Derivative Transactions (Rs. Cr)

Contracts	Purchase		Sell		Net Value	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value		Contract	Value	Contract	Value	Contract	Value
Index Future	45082	7125	45769	7106	19	275149	43518	279754	44739	(4605)	(1221)
Index Option	3351139	552205	3345541	550975	1230	2183179	355591	1860938	303368	322241	52223
Stock Future	1844346	109023	1866875	110117	(1094)	5859577	351407	5855630	353629	3947	(2222)
Stock Option	1671990	103267	1653366	102023	1244	1848825	107241	1765413	103634	83412	3607
<b>Total</b>	<b>6912557</b>	<b>771620</b>	<b>6911551</b>	<b>770221</b>	<b>1399</b>	<b>10166730</b>	<b>857757</b>	<b>9761735</b>	<b>805370</b>	<b>404995</b>	<b>52387</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
14-Feb-25	8848	13872	(5023)
17-Feb-25	9143	11265	(2123)
18-Feb-25	9143	11265	(2123)
20-Feb-25	32022	23806	8216
21-Feb-25	11216	14723	(3508)
<b>Month to date- Feb</b>	<b>193911</b>	<b>219742</b>	<b>(25831)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
17-Feb-25	6827	10765	(3938)
18-Feb-25	14538	9751	4787
19-Feb-25	11571	13452	(1881)
20-Feb-25	11132	14443	(3312)
21-Feb-25	10144	13593	(3449)
<b>Month to date-Feb</b>	<b>180556</b>	<b>217533</b>	<b>(36977)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
17-Feb-25	12504	7744	4760
18-Feb-25	12793	9721	3072
19-Feb-25	11193	9235	1958
20-Feb-25	13180	9273	3908
21-Feb-25	12889	10005	2885
<b>Month to date-Feb</b>	<b>211761</b>	<b>169160</b>	<b>42601</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
14-Feb-25	693	2433	(1740)
17-Feb-25	2347	2849	(502)
18-Feb-25	2347	2849	(502)
20-Feb-25	846	2849	(2003)
21-Feb-25	1580	2811	(1231)
<b>Month to date- Feb</b>	<b>25962</b>	<b>34113</b>	<b>(8150)</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1652	41%	1072	37%
Decline	2304	57%	1755	61%
Unchanged	104	3%	49	2%

Market Turnover	21-Feb	20-Feb	Var (%)
BSE Cash	5126	4051	27%
NSE Cash	85628	80372	7%
NSE Futures	277438	124342	123%
NSE Options	11074844	32387259	-66%
Total (Rs.Cr)	11443036	32596024	-65%

Volatility Index	21-Feb	20-Feb
Volatility Index	14.53	14.68

Index PE - TTM	21-Feb	Yr. High	Yr. Low
Sensex	21.0	25.7	21.0
Nifty	20.3	24.4	20.3

Corporate News

**Adani Green Energy operationalises 250 MW solar project in Rajasthan**

The company's stepdown arm Adani Green Energy Twenty-Four operationalises solar power project of 250 MW at Jaisalmer. The total operational renewable generation capacity increases to 11,916.1 MW post commissioning of the project. (NDTV)

**Vedanta emerges as preferred bidder for diamond block in MP**

Vedanta has been declared as 'Preferred Bidder' for the Kauhari Diamond Block (on highest Final Price Offer of 1.10%). As per the tender document, the Kauhari Diamond Block is at G4 level of exploration with total area of 643.4169 hectares for the block. (NDTV)

**UP CM Yogi Adityanath lays foundation for Balrampur Chini Mills' Rs. 2,850 crore biopolymer plant**

The company lays foundation of Polylactic Acid biopolymer plant at Uttar Pradesh with Rs 2,850 crore capex. This plant is going to be India's first industrial scale biopolymer plant & also set a new global benchmark. It will be powered by 100% renewable energy for its entire production process. (NDTV)

Economy

**India's coal imports flat at 201 MT in Apr-Dec period**

India's coal imports remained nearly unchanged at 201.30 million tonnes during April-December of the current fiscal year, compared to the same period last year. High domestic coal stocks and lower-than-expected demand contributed to the slight decline in import volumes, even as domestic production increased by 6.11 per cent. (ET)

**India's GDP growth likely to improve to 6.2 pc in Q3FY25 from 5.4 pc in Q2FY25: Union Bank of India**

India's economic growth is expected to pick up momentum in the third quarter of the financial year 2024-25 (Q3FY25), with GDP growth estimated at 6.2 per cent, up from 5.4 per cent in the second quarter (Q2FY25), according to a report by Union Bank of India. (ET)

International

**Alibaba to invest more than \$52 billion in AI over next 3 years**

Alibaba plans to invest at least 380 billion yuan (\$52.44 billion) in its cloud computing and artificial intelligence infrastructure over the next three years. The company had reported revenue of 280.15 billion yuan for the three months ended December 31, marginally ahead of market estimates. (Inv)

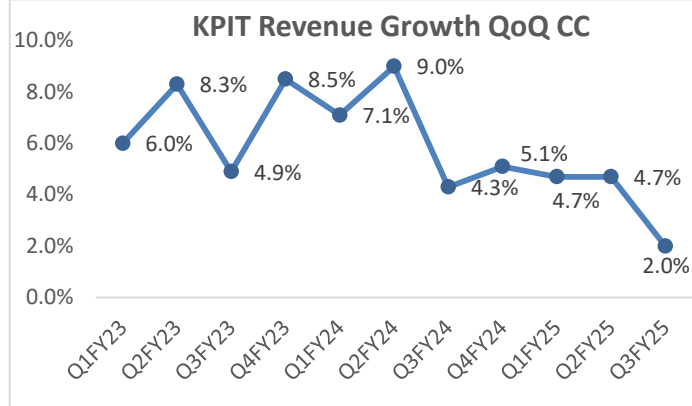
Top 5 Nifty Gainers	21-Feb	20-Feb	Var(%)
HINDALCO	654	639	2.3%
TATASTEEL	141	138	2.0%
SBILIFE	1495	1470	1.7%
EICHERMOT	4962	4888	1.5%
LT	3315	3276	1.2%
Top 5 Nifty Losers	21-Feb	20-Feb	Var(%)
M&M	2669	2839	-6.0%
BPCL	251	259	-2.8%
ADANI PORTS	1083	1112	-2.6%
TATAMOTORS	673	690	-2.4%
WIPRO	306	313	-2.2%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	75311	-0.6%	-0.8%	-1.2%	3.0%
MIDCAP	40374	-1.2%	1.6%	-5.5%	1.1%
SMLCAP	45856	-0.4%	1.0%	-8.5%	-0.4%
AUTO	48135	-2.6%	-2.4%	-3.7%	1.4%
BANKEX	55718	-0.8%	-0.2%	1.8%	4.7%
Capital Goods	58399	-0.1%	1.8%	-6.2%	2.9%
FMCG	18943	-0.5%	-1.5%	-7.0%	-3.4%
Health Care	39620	-1.6%	-0.7%	-6.1%	10.8%
IT	39764	-0.7%	-2.0%	-6.9%	2.9%
METAL	29197	1.2%	5.7%	2.4%	6.6%
Oil & Gas	23901	-1.4%	2.3%	-5.1%	-15.7%
Power	6091	-0.3%	4.6%	-5.7%	-7.9%
Realty	6561	-1.3%	1.2%	-2.3%	-9.6%

NSE USD Futures	21-Feb	20-Feb	Var (%)
Feb Expiry (Rs./\$)	84.83	84.83	0.0%
Mar Expiry (Rs./\$)	86.67	86.67	0.0%
Total Turnover (Rs. Crore)	4171	4242	-2%

Sectors	TTM PE
Auto	29.17
Auto Ancillary	38.31
Banking	12.71
Engineering	45.11
Cement	70.74
Diamonds & Jewellery	44.93
Housing Finance	23.96
Infrastructure & Const	31.45
Metals-Aluminium	25.66
Metal – Steel	16.58
Oil Expl.	9.41
Pharma	9.08
Power – Gen. Supp.	37.16
Information Tech.	25.81
Sugar	16.77
Telecom Serv. Prov.	42.75
Tyres	27.53

**KPIT Technologies Ltd Rev Growth data**  
(Source: Company)



10 year G-Sec Yield	Current	Previous	Change
<b>US</b>	4.43%	4.51%	(7) bps
<b>Japan</b>	1.43%	1.45%	(2) bps
<b>India</b>	6.71%	6.70%	0 bps
<b>UK</b>	4.57%	4.61%	(4) bps
<b>Libor 3 Mths</b>	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	636	636	0.0%
Inflation - WPI	2.31%	2.37%	(6) bps
Inflation - CPI	4.31%	5.22%	(91) bps

India GDP	Q2FY25	Q1FY25	Var(%)
Growth	5.36%	6.65%	(129) bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.25%	6.50%	(25) bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.00%	4.00%	0 bps
O/S Banking System Liquidity (Rs bn)	-2120	-2031	(89.7)

IIP Growth %	Nov-24	Nov-23	Apr-Feb
IIP	5.2	2.5	4.4
Capital Goods	9.0	-1.1	4.5
Mining	5.8	1.3	4.1
Manufacturing	4.4	5.8	6.0
Electricity	1.9	7.0	3.6





**Bulk Deal As On 21/02/25**

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
543938	ACCELERATE	ARCHIT INFRASTRUCTURE AND DEVELOPERS LLP	B	24960	115.87
543938	ACCELERATE	VINEY EQUITY MARKET LLP	S	24320	115.95
541144	ACTIVE	RAVINDER KUMAR AGARWAL	B	126826	139.84
541144	ACTIVE	SULOCHANA RANI BALUSU	S	125000	139.86
539946	BAZELINTER	CHINTAN BHARAT RUPAPARA	S	12837	66.19
542678	CHCL	SANKLECHA SONALI DILIP	S	150000	3.94
539800	CHDCHEM	MANJU GAGGAR	B	64925	8.19
531099	CHECKPOINT	ANKIT MEHRA	B	56881	15.42
539091	CITL	HIMANSHU CHINUBHAI SHAH	S	2376595	2.38
539091	CITL	MANJULABEN BHAVSONGA THAKOR	S	1500000	2.39
539596	DELTA	RAKESH KUMAR GOEL	S	50000	9.45
539596	DELTA	VATSAL AGARWAAL	B	50000	9.45
543848	DEVLAB	RAKSH STAR TRADING PRIVATE LIMITED	B	95000	63.64
537707	ETT	KAUSHAL HITESHBAI PARIKH	B	105362	15.86
543500	EVOQ	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	68000	5.52
543500	EVOQ	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	200000	5.53
543500	EVOQ	PUJABAHEN BAROT	S	1296000	5.9
543500	EVOQ	SETU SECURITIES PVT. LTD.	S	84000	5.52
543500	EVOQ	SETU SECURITIES PVT. LTD.	B	200000	5.62
539680	GANGAPHARM	PANKAJ KESHAV TORNE	S	48000	10.98
543372	GETALONG	SAHER SHAHJAD HIRA	S	180000	26.99
539692	IFINSER	SADHNA ROCHIRAM VIDHANI	S	49273	30
539692	IFINSER	VIPUL HARIDAS THAKKAR	B	45000	30
524614	INDXTRA	VAIBHAV BHATNAGAR	B	212674	6.1
523638	IPRINGLTD	GOVINDLAL MANSUKHLAL PARIKH	S	89947	133.92
523638	IPRINGLTD	SANDHYA GOVIND PARIKH	B	89599	133.99
544366	LKMEHTA	A B & CO	B	70400	71.1
544366	LKMEHTA	ASHAY VORA	B	44800	69.39
544366	LKMEHTA	DHARAM PAL AGGARWAL	B	32000	71.1
544366	LKMEHTA	NAINI LUNIYA	B	22400	71.1
544366	LKMEHTA	PRIYANKADUNGARWAL	B	20800	70
544366	LKMEHTA	SIDDHARTH MEHTA	B	25600	71.03
544366	LKMEHTA	SUYASH JAIN	B	27200	71.1
544366	LKMEHTA	VEENA RAJESH SHAH	B	40000	71.1
543364	MARKOLINES	ALMONDZ GLOBAL SECURITIES LIMITED.	B	200000	130.72
543364	MARKOLINES	KUNAL ATUL BORA	S	205600	130.72
539762	MEAPL	KASTURCHAND JETHMAL KOCHAR	S	178000	31.45
539762	MEAPL	PADMA V KOCHAR	B	140000	31.44
540809	MRCAGRO	KIRAN KUMAR KANTIBHAI SHETH	S	102798	10.82
540809	MRCAGRO	RASHI AGRAWAL	S	290000	11.18
540809	MRCAGRO	RASHI AGRAWAL	B	290221	11.03
540809	MRCAGRO	SAGAR ROHILLA	S	220233	11.12
540809	MRCAGRO	SAGAR ROHILLA	B	234044	11.11
540809	MRCAGRO	SHILPI GUPTA	B	150000	11.3
543305	NAVODAYENT	ANAND VASANT MODE	S	252000	8.15
543305	NAVODAYENT	SHIVANISHARMA	B	96000	8.22

543305	NAVODAYENT	SUBNESHCHANDER	B	96000	8.08
543305	NAVODAYENT	VINUTHA DAMODAR POOJARY	B	72000	8.17
530805	OIVL	DEALMONEY COMMODITIES PRIVATE LIMITED	S	264343	11.37
530805	OIVL	KALPANA MARUTHAM	S	175000	11.37
530805	OIVL	SAVAN RAJENDRAKUMAR PATEL	B	300000	11.37
530805	OIVL	SEIFER RICHARD MASCARENHAS	B	841200	11.37
530805	OIVL	VIVEK MISHRA	S	650000	11.37
530805	OIVL	YAKSHIT FINANCE LIMITED	S	200000	11.38
543400	OMNIPOTENT	KRISHNA MURARI TEKRIWAL	B	170000	8.49
543400	OMNIPOTENT	SUMAN TEKRIWAL	S	70000	8.67
543400	OMNIPOTENT	SUMANTEKRIWAL	S	78000	8.29
543400	OMNIPOTENT	SUMANTEKRIWAL	B	12000	8.67
530095	PRADHIN	AMIN ABDULBHAI NAYANI	S	169992	17.88
530095	PRADHIN	HITESH SINGH	S	174388	16.93
512591	PULSRIN	RAJESH SUBHASH JANGAM	S	430847	18.65
519397	SHINDL	POONAMALEE KASIKARA RAMESH KAUSHIK	S	193000	84.03
519397	SHINDL	RAASHA FINCAP PRIVATE LIMITED	B	275000	83.88
543970	SHOORA	H.H.LAKHANI LLP	B	9000	60.62
543970	SHOORA	RC SPL SHARE BROKING PRIVATE LIMITED	B	7500	60.61
543970	SHOORA	RIKHAV SECURITIES LIMITED	S	10500	60.62
543970	SHOORA	RIKHAV SECURITIES LIMITED	B	3000	60.61
543970	SHOORA	SUNIT MORARJEE	S	7500	60.61
519566	SIMRAN	KAUSHIKBHAIMAYACHANDMEHTAHUF	B	19000	183.15
519566	SIMRAN	RASHMIBEN KAUSHIKBHAI MEHTA	S	19000	183.15
521005	TITANIN	APPLE EQUIFIN PVT LTD	S	42614	15.01
521005	TITANIN	APPLE EQUIFIN PVT LTD	B	154100	15.2
539798	UMIYA	BHIKHAJI KACHARAJI CHAVDA	S	59633	28.25
542803	VEL	BHATI SHANI	S	100000	12
542803	VEL	DEVI SINGH	S	100000	12
542803	VEL	DOLLY VISHAL SHAH	B	51000	12
542803	VEL	VARSHA VAIBHAV PATIL	B	102000	12
542803	VEL	VIRAL BALVAHTRAY PANDYA	B	50100	12
506122	VOLKAI	SATISH GOUD BATHINI	B	2475	270.11

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ALKEM	Alkem Laboratories Ltd.	SAMPRADA&NANHAMATI SINGH FAMILY TRUST	SELL	641712	4680
ALKEM	Alkem Laboratories Ltd.	SAMPRADA&NANHAMATI SINGH FAMILY TRUST	SELL	641712	4680
ALKEM	Alkem Laboratories Ltd.	SBI MUTUAL FUND	BUY	641712	4680
ARIHANTACA	Arihant Academy Limited	KIRTI UMESH PANGAM	SELL	40800	210.02
BAIDFIN	Baid Finserv Limited	DREAM PRIME DEVELOPERS PRIVATE LIMITED	SELL	1325000	11.25
BAIDFIN	Baid Finserv Limited	DREAM REALMART PRIVATE LIMITED	BUY	1325000	11.25
FONEBOX	Fonebox Retail Limited	ARCHIT INFRASTRUCTURE AND DEVELOPERS LLP	BUY	65000	105.97
FONEBOX	Fonebox Retail Limited	VINEY EQUITY MARKET LLP	SELL	62000	106
GSTL	Globesecure Techno Ltd	DIPAKBHAI NANDLALBHAI VASVANI	BUY	82000	24.65
KEN	Ken Enterprises Limited	ZEAL GLOBAL OPPORTUNITIES FUND	BUY	777600	57.44
PRAXIS	Praxis Home Retail Ltd	LITTY THOMAS	BUY	1000000	13.1
PRAXIS	Praxis Home Retail Ltd	SURPLUS FINVEST PRIVATE LIMITED	SELL	1922375	13.1
SHANTI	Shanti Overseas (Ind) Ltd	GAJANAND JASHWANTBHAI TAILOR	SELL	167315	11.92
SHANTI	Shanti Overseas (Ind) Ltd	HEMAL ARUNBHAI MEHTA	BUY	245500	11.96
SHANTI	Shanti Overseas (Ind) Ltd	MANISH KUMAR HUF	SELL	73458	11.97
STALLION	Stallion Ind Fluorochem L	ASHIKA GLOBAL SECURITIES PRIVATE LIMITED	SELL	552471	74
STALLION	Stallion Ind Fluorochem L	CRAFT EMERGING MARKET FUND PCC- CITADEL CAPITAL FUND	SELL	552471	74
STALLION	Stallion Ind Fluorochem L	NEOMILE GROWTH FUND - SERIES I	BUY	2444553	73.6
SBGLP	Suratwala Bus Group Ltd	DIVYAYUDH TRADING PRIVATE LIMITED	SELL	1198000	48.69
VLEGOV	VL E Gov and IT Sol Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	1400000	65.41

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