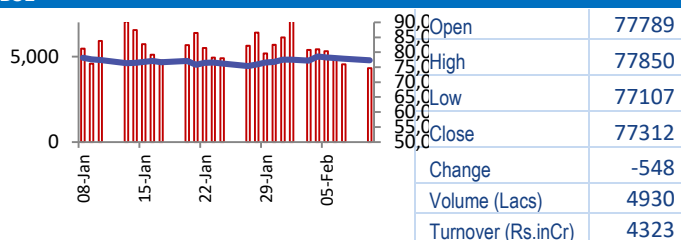
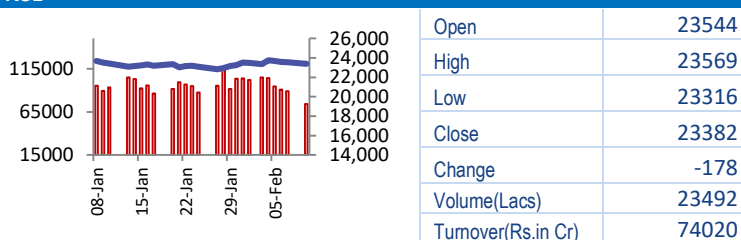


BSE



NSE



World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44470	44303	167	0.4%
Dow Futures	44482	44580	(98)	-0.2%
Nasdaq	19714	19523	191	1.0%
FTSE	8768	8701	67	0.8%
Nikkei	38751	38751	CLOSED	CLOSED
Hang Seng	21388	21522	(134)	-0.6%
Gift Nifty	23471	23493	(22)	-0.1%
Straits Singapore	3859	3875	(16)	-0.4%
South Korea	2534	2521	13	0.5%
Taiwan	23375	23252	123	0.5%
Shanghai	3311	3322	(11)	-0.3%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9448	9408	40	0.4%
Alumin (\$/MT)	2659	2628	31	1.2%
Zinc (\$/MT)	2847	2840	7	0.2%
Brent Crude (\$/bbl)	76	76	0	0.0%
Gold (\$/Ounce)	2916	2908	8	0.3%
Silver (\$/Ounce)	32	32	0	0.0%
Light Crude (\$/bbl)	72	72	0	0.0%
N G (\$/mmbtu)	3	3	0	0.0%
Sugar (\$/MT)	504	503	1	0.2%
Rubber (Rs./kg)	191	191	0	0.0%
Baltic Dry Index	809	815	(6)	-0.7%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	87.48	87.43	0.06%
Rs./ Euro	90.32	90.85	-0.58%
Rs./Chinese Yuan	11.97	12.00	-0.25%
Yen / \$ rate	151.98	152.00	-0.01%
\$ US/Euro	1.03	1.03	0.00%

Dollar Index	Current	Previous	Var(%)
Dollar Index	108.42	108.32	0.09%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	23300	50000
Support 2	23240	49740
Resistance	23440	50470

Securities in Ban For Trade
MANAPPURAM

Market Review

US: US stocks bounced back on Monday as investors looked beyond President Trump's latest tariff threats, including new levies on steel and aluminium imports.

Asia: Stocks in Asia are set for a tepid open after Trump imposed 25% tariffs on all US imports of steel and aluminium.

India: Benchmark equity indices ended the week's first trading session lower, dragged down by selling across the counters. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

Global economy: Trump signed proclamations that raised the tariff rate on aluminium imports to 25% from the previous 10% that he imposed in 2018 to aid the struggling sector. His action reinstates a 25% tariff on millions of tons of steel imports and aluminum imports that had been entering the U.S. duty free under quota deals, exemptions and thousands of product exclusions.

Australian consumer sentiment was largely unchanged in February after dropping in the previous two months reflecting a cautious economic outlook despite interest rate cut expectations. The consumer mood improved materially over the second half of 2024 but the recovery has stalled in the last three months as continued pressures on family finances and a more unsettled global backdrop have weighed against firming expectations of rate cuts domestically.

The commercial property market in Germany has exhibited signs of stabilization following a 5.4% drop in prices in 2024. Despite the ongoing decline, the rate of decrease in 2024 was less severe compared to the 10.2% fall experienced in 2023. The real estate sector in Germany is currently grappling with its most severe crisis in decades.

Commodities: Oil prices were steady on Tuesday as traders digested another round of trade tariffs, this time a 25% levy on all U.S. imports of steel and aluminum, which could weigh on global economic and energy demand in the world's biggest oil consumer.

Gold prices hit fresh record Monday, shrugging off a rising dollar as after Trump announced more trade tariffs, this time aimed at commodity imports, boosting demand for the safe-haven metal.

Currency: The dollar firmed on Tuesday after U.S. President moved to substantially raise tariffs on steel and aluminium imports and said he would announce plans to impose reciprocal tariffs on other countries over the coming days.

FII Derivative Transactions (Rs. Cr)

Contracts	Purchase		Sell		Net	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value	Value	Contract	Value	Contract	Value	Contract	Value
Index Future	12019	1976	23037	3791	(1815)	246866	40475	238926	39489	7940	986
Index Option	3681611	643658	3646393	636935	6723	2216344	373105	2111321	356511	105023	16594
Stock Future	256973	15783	291566	17780	(1997)	5730302	353600	5726971	358226	3331	(4626)
Stock Option	946896	60925	980137	62738	(1813)	1183607	70365	1109740	67062	73867	3303
Total	4897499	722342	4941133	721244	1098	9377119	837545	9186958	821288	190161	16257

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
3-Feb-25	14406	18034	(3628)
4-Feb-25	18989	17960	1029
5-Feb-25	14873	16021	(1148)
6-Feb-25	13765	17360	(3594)
7-Feb-25	12962	13434	(473)
Month to date- Feb	74995	82808	(7813)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
4-Feb-25	18106	17297	809
5-Feb-25	14112	15795	(1683)
6-Feb-25	13470	17020	(3550)
7-Feb-25	12482	12953	(470)
10-Feb-25	9608	12072	(2464)
Month to date-Feb	81272	93915	(12643)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
4-Feb-25	15003	15433	(431)
5-Feb-25	12861	11864	996
6-Feb-25	11546	8824	2722
7-Feb-25	12186	11731	454
10-Feb-25	9802	8287	1516
Month to date-Feb	94081	85291	8790
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
3-Feb-25	2945	1002	1943
4-Feb-25	3107	774	2333
5-Feb-25	2299	1175	1124
6-Feb-25	3225	880	2345
7-Feb-25	1110	362	748
Month to date- Feb	12686	4193	8492

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	993	24%	559	19%
Decline	3125	74%	2296	79%
Unchanged	107	3%	54	2%

Market Turnover	10-Feb	07-Feb	Var (%)
BSE Cash	4323	4548	-5%
NSE Cash	74020	88908	-17%
NSE Futures	89811	128124	-30%
NSE Options	9779354	11200345	-13%
Total (Rs.Cr)	9947508	11421924	-13%

Volatility Index	10-Feb	07-Feb
Volatility Index	14.45	13.69

Index PE - TTM	10-Feb	Yr. High	Yr. Low
Sensex	21.5	25.7	21.5
Nifty	20.8	24.4	20.8

Corporate News

Escorts Kubota Amends Agreement for Rs 1,600-Cr Sale of Railway Equipment Division to Sona BLW

Escorts Kubota Ltd. has entered into an amended and restated business transfer agreement with Sona BLW Precision Forgings Ltd. for the sale of its railway equipment division. The revised agreement modifies certain terms of the initial BTA signed on Oct. 23, 2024, including changes related to a portion of the Rs 1,600-cr consideration being placed in escrow and released in tranches upon the completion of specific milestones (NDTV)

Shriram properties signs JDA for prime residential development in Chennai

Shriram Properties Ltd has entered a JDA to develop a 3.2 lakh sq. ft. premium residential project in Koyambedu, Chennai. Expected revenue is ₹350-400 cr, with a launch planned for early FY26. The project boosts SPL's asset-light strategy and expands their market presence in Chennai, Bangalore, and Kolkata. (ET)

Mankind Pharma Approves Sale of Entire Stake in Wholly Owned Mahananda Spa and Resorts To Chalet Hotels

Mankind Pharma approved the sale of the company's entire stake in wholly owned subsidiary Mahananda Spa and Resorts Pvt. to Chalet Hotels Ltd. The proceeds of monetisation of non-core assets are to be utilised to retire part of its debts. (NDTV)

Economy

Centre releases Rs 1.11 lakh cr interest-free loan to states in April-January

The Centre has released Rs 1.11 lakh cr loan to states during April-January under a capital expenditure scheme. The allocation for interest-free loans in the 2024-25 Budget increased to Rs 1.5 lakh cr. Top beneficiary states include Bihar, UP, MP and WB. Funds promote infrastructure, reforms, and specific projects. (ET)

Agri ministry revises guidelines of Market Intervention Scheme to encourage states for implementation

The agriculture ministry has revised guidelines for the MIS, increasing the crop procurement limit from 20 to 25%. MIS helps farmers avoid distress sales by intervening when market prices fall by at least 10%. (ET)

International

Columbus McKinnon to buy Kito Crosby from KKR for \$2.7 bln

Crane manufacturer Columbus McKinnon Corp will buy private rival Kito Crosby from funds operated by KKR & Co LP in an all cash deal worth \$2.7 bn, adding it to its host of crane brands. (Inv)

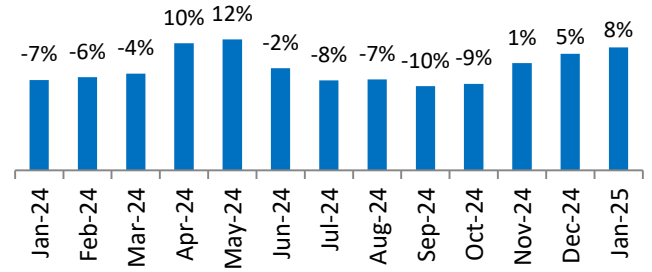
Top 5 Nifty Gainers	10-Feb	07-Feb	Var(%)
KOTAKBANK	1960	1929	1.6%
BHARTIARTL	1693	1677	1.0%
BRITANNIA	4910	4871	0.8%
TATACONSUM	1028	1021	0.6%
HCLTECH	1734	1726	0.5%
Top 5 Nifty Losers	10-Feb	07-Feb	Var(%)
TRENT	5197	5454	-4.7%
POWERGRID	269	278	-3.4%
TATASTEEL	134	138	-3.1%
TITAN	3327	3425	-2.8%
ONGC	242	249	-2.6%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	77312	-0.7%	0.2%	-0.1%	8.0%
MIDCAP	42162	-2.1%	-0.8%	-4.7%	6.6%
SMLCAP	49035	-2.3%	-0.4%	-7.0%	7.4%
AUTO	51900	-1.5%	-0.9%	-0.2%	15.9%
BANKEK	56641	-0.2%	1.4%	2.4%	9.5%
Capital Goods	60391	-1.1%	0.8%	-6.0%	8.9%
FMCG	19929	-0.6%	-4.3%	-4.0%	2.5%
Health Care	42180	-2.2%	0.7%	-3.5%	20.8%
IT	41850	-0.9%	0.5%	-5.2%	8.8%
METAL	28154	-2.6%	2.1%	1.7%	1.4%
Oil & Gas	24450	-1.8%	0.4%	-5.8%	-12.8%
Power	6112	-2.4%	-0.9%	-4.8%	-5.8%
Realty	6963	-2.7%	-5.7%	-8.3%	0.6%

NSE USD Futures	10-Feb	07-Feb	Var (%)
Feb Expiry (Rs./\$)	84.86	88.42	-4.0%
Mar Expiry (Rs./\$)	84.83	84.86	0.0%
Total Turnover (Rs. Crore)	9606	2367	306%

Sectors	TTM PE
Auto	31.92
Auto Ancillary	41.42
Banking	13.06
Engineering	46.85
Cement	76.43
Diamonds & Jewellery	49.82
Housing Finance	24.61
Infrastructure & Const	33.09
Metals-Aluminium	27.11
Metal – Steel	16.65
Oil Expl.	12.46
Pharma	9.49
Power – Gen. Supp.	40.95
Information Tech.	26.8
Sugar	22.71
Telecom Serv. Prov.	44.32
Tyres	28.16

Ashok Leyland Monthly Volume Growth (YoY)
(Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.50%	4.49%	1 bps
Japan	1.32%	1.30%	2 bps
India	6.71%	6.70%	1 bps
UK	4.46%	4.48%	(2) bps
Libor 3 Mths	4.85%	4.85%	0 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	631	631	0.0%
Inflation - WPI	1.89%	2.36%	(47) bps
Inflation - CPI	5.22%	5.48%	(73) 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)	-1346	-1347	1.2

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

ADR Price Movement

Company	Price (US\$)	Volume	Previous Day Price	Volume	Variance (%)	No. of Share Per ADR	ADR Price (Rs.)	BSE Price	Variance (%)
Infosys Tech	21.87	9249938	21.83	9618042	0.18%	1	1913.10	1880.30	1.7%
Wipro	3.69	2799262	3.67	4723983	0.54%	1	322.79	319.05	1.2%
Dr.Reddy's	13.81	1183644	13.89	1731501	-0.58%	1	1208.05	1220.95	-1.1%
ICICI Bank	28.53	4100157	28.43	4156301	0.35%	2	1247.85	1262.60	-1.2%
HDFC Bank	60.57	2349453	61.22	1568691	-1.06%	3	1766.14	1715.75	2.9%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	37.90	37.70	0.2	0.5%
RIL	57.20	57.70	(0.5)	-0.9%
SBI	83.90	83.60	0.3	0.4%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.90%	2.70%
Unemployment (%)	4.00%	4.10%

Interest Rate (%)	Current	Previous
Fed Rate	4.50%	4.50%

US GDP	Q3CY24	Q2CY24
Growth (QoQ Annualized)	2.30%	3.10%

China Economy Data	Current	Previous
GDP	5.40%	4.60%
Inflation – CPI (%)	0.10%	0.20%

Economic Calendar

Economic Calendar	Date
Indian GDP Data	28 Feb
Indian Inflation Data CPI	12 Feb
Indian Inflation Data WPI	14 Feb
Indian Monetary Policy	To be announced
India's Industrial Production (IIP)	12 Feb
US Inflation Data	12 Feb
US GDP	27 Feb
US Unemployment Data	07 Mar
US Fed Rate	19 Mar
China GDP	16 Apr
China Inflation Data	09 Feb

Event Update

Name	Date	Purpose
CMS Info Systems Ltd.	11/02/25	Rs.3.25 per share(32.5%)Interim Dividend
Disa India Ltd.	11/02/25	Rs.100.00 per share(1000%)Interim Dividend
EFC (I) Ltd.	11/02/25	Bonus issue
Symphony Ltd.	11/02/25	Rs.2.00 per share(100%)Third Interim Dividend
Man InfraConstruction Ltd.	12/02/25	Rs.0.45 per share(22.5%)Second Interim Dividend
T.T. Ltd.	12/02/25	Stock Split from Rs.10/- to Re.1/-
TCI Express Ltd.	12/02/25	Second Interim Dividend
Torrent Power Ltd.	12/02/25	Rs.14.00 per share(140%)Interim Dividend
Page Industries Ltd.	13/02/25	Third Interim Dividend
Sun TV Network Ltd.	13/02/25	Interim Dividend
Veedol Corporation Ltd.	13/02/25	Rs.12.00 per share(600%)Second Interim Dividend
Aarti Pharmed Labs Ltd.	14/02/25	Rs.2.50 per share(50%)Interim Dividend
Alkem Laboratories Ltd.	14/02/25	Interim Dividend
Cummins India Ltd.	14/02/25	Rs.18.00 per share(900%)Interim Dividend
Dhruv Consultancy Services Ltd.	14/02/25	Rs.0.10 per share(1%)Interim Dividend
EKI Energy Services Ltd.	14/02/25	Interim Dividend
Engineers India Ltd.	14/02/25	Interim Dividend
Escorts Kubota Ltd.	14/02/25	Interim Dividend
Kirloskar Ferrous Industries Ltd.	14/02/25	Rs.3.00 per share(60%)Interim Dividend
Majestic Auto Ltd.	14/02/25	Rs.5.00 per share(50%)Interim Dividend
MRF Ltd.	14/02/25	Interim Dividend
Nicco Parks & Resorts Ltd.	14/02/25	Interim Dividend
Premier Energies Ltd.	14/02/25	Rs.0.50 per share(50%)Interim Dividend
Richfield Financial Services Ltd.	14/02/25	Bonus issue

Bulk Deal As On 10/02/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
540135	ARCFIN	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	B	5003182	1.38
539946	BAZELINTER	RAJESH GUPTA	B	10000	88.5
539946	BAZELINTER	VEEET CAPITAL SERVICES PRIVATE LIMITED	S	10000	88.5
531099	CHECKPOINT	GAUTAMKUMAR KANORIA	S	50000	13.99
531099	CHECKPOINT	KARTIK SUNIL JAIN	S	235664	13.99
531099	CHECKPOINT	M7 GLOBAL FUND PCC - CELL DEWCAP FUND	B	299861	13.99
543435	CLARA	SHERWOOD SECURITIES PVT LTD	S	190900	27.98
544220	CTLLAB	SANJAY HARSHADRAI MEHTA	S	21600	78.43
543516	DHYAANITR	DEV HASMUKHBHAI KAPADIYA	B	103600	17.49
543516	DHYAANITR	PRAVINBHAI KARSANLAL KARIYA HUF	S	182000	17.49
521137	EUREKAI	SONAM GOYAL	B	72041	13.89
508980	FRONTCAP	INIMITABLE CAPITALFINANCE PRIVATE LIMITED	S	300000	19.33
508980	FRONTCAP	PARESH DINESHLAL SHAH	B	101000	19.33
539216	GARMNTMNTR	B B COMMERCIAL LTD	S	1380280	1.91
539486	GEETANJ	LEELAMMATHENUMKALJOSEPH	B	22340	5.29
540938	GUJHYSPI	BHAVIKA DHIRAJLAL CHAVDA	S	130000	22.91
500458	KORE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	206478	29.28
502250	LERTHAI	BAO VALUE FUND	S	11190	460.3
502250	LERTHAI	XIAO PROJECT PTY LTD	B	11000	460.3
541196	LEX	PRAVEEN CHAKRAVARTHY MEDIKUNDAM	B	26000	79.8
541196	LEX	VENKATA SITA RAMARAJU BUDDARAJU	S	26000	79.8
507912	LKPFIN	ATUL GOEL FAMILY TRUST	S	74538	244.21
543613	MAFIA	CHEREKANDYJIBI	S	56000	15.26
505343	MONOT	INNOCENT INVESTMENT CONSULTANTS LLP	S	3915147	0.9
542724	MURAE	SAKET KUMAR	S	9501958	1.85
511658	NETTLINX	MANOHAR REDDY LOKA	S	300000	93.79
511658	NETTLINX	NIKHIL SANTOSH OSWAL	B	124000	91.54
540198	OSIAJEE	DEEPIKA HARISH JAIN	B	59762	63.97
540198	OSIAJEE	NIDHI JAIN	B	31780	65.3
526490	PRATIK	SUSHIL KUMAR PUJARI	S	500221	7.3
512591	PULSRIN	GILANI INFRA PRIVATE LIMITED	S	1147266	16.84
512591	PULSRIN	L7 HITECH PRIVATE LIMITED	B	540000	16.84
511116	QUADRANT	IDBI TRUSTESHIP SERVICES LTD	S	12000000	0.49
530525	RRETAIL	BLACKBERRY SAREES PRIVATE LIMITED	B	1847668	9.03
539584	SIPTL	MUKESH KUMAR MEENA	S	654461	0.89
522152	SOLIMAC	VINEET KHANNA	B	25400	124.87
523425	SUNRAJDI	RAHUL RAJESHKUMAR SINHA	B	39701	12.46
523425	SUNRAJDI	SUMITKUMAR JAGDISHCHANDRA THAKKAR	B	165000	12.5
523425	SUNRAJDI	SUNNY SUNIL GANDHI	S	200000	12.5
526133	SUPERTEX	KAMAL KUMAR GOYAL	B	97376	9.83
526133	SUPERTEX	PANKAJ KUMAR GOYAL HUF	B	75000	9.83
526133	SUPERTEX	RAMESH CHEPURI	S	11919	10.01
526133	SUPERTEX	RAMESH CHEPURI	B	85004	9.86
526133	SUPERTEX	SHRUSHTI AMRIT GANDHI	S	317305	9.83
531499	SYBLY	GRID TRADING PRIVATE LIMITED	S	100000	8.19
531499	SYBLY	VARSHA ACHYUTKUMAR MODI	B	50000	8.19
531499	SYBLY	VISAGAR FINANCIAL SERVICES LIMITED	S	85688	8.19
500422	TRANSCHEM	BRIJWASI SECURITIES PVT. LTD	S	585341	45.75
500422	TRANSCHEM	PRIYANKA FINANCE PRIVATE LIMITED	B	584387	45.75
506122	VOLKAI	DEVENDRA VEER GUPTA	S	4020	227
506122	VOLKAI	VIJAY OMPRAKASH SETHI	B	3618	241.81

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
CRAFTSMAN	Craftsman Automation Ltd	MIRAE ASSET MUTUAL FUND	SELL	140093	4078.36
CRAFTSMAN	Craftsman Automation Ltd	NIPPON INDIA MUTUAL FUND	BUY	140000	4078.36
JALAN	Jalan Transolu. India Ltd	AVIJIT KUNDU	BUY	108000	9
MANALIPETC	Manali Petrochemicals Lt	WALERY SECURITY MANAGEMENT LIMITED	BUY	1337500	60.92
NAVKARURB	Nav kar Urbanstructure Ltd	TRADE CORNER	BUY	1150000	17.73
QUADFUTURE	Quadrant Future Tek Ltd	SHINE STAR BUILD CAP PVT LTD	SELL	304025	581.6
REXPRO	Rex pro Enterprises Ltd	M7 GLOBAL FUND PCC - CELL DEWCAP FUND	BUY	224000	79.83
UNIECOM	Unicommerce Esolutions L	ABSOLUTE RETURNS SCHEME	SELL	521104	139.13
UPL	UPL Limited	NERKA CHEMICALS PRIVATE LTD	BUY	780000	641
UPL	UPL Limited	UNIPHOS ENTERPRISES LTD	SELL	780000	641

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