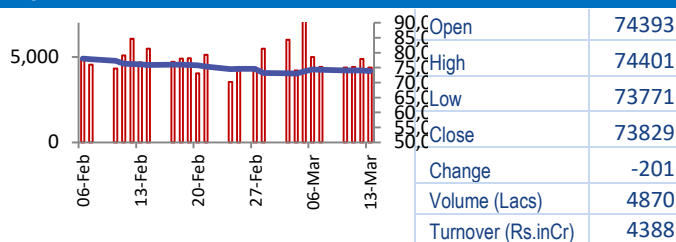
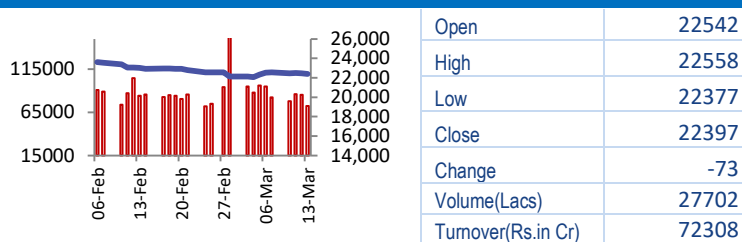


X BSE



NSE



World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	41488	40814	675	1.7%
Dow Futures	41665	41850	(185)	-0.4%
Nasdaq	17754	17303	451	2.6%
FTSE	8632	8543	90	1.1%
Nikkei	37475	37053	422	1.1%
Hang Seng	24331	23960	371	1.5%
Gift Nifty	22582	22555	27	0.1%
Straits Singapore	3867	3836	31	0.8%
South Korea	2603	2566	36	1.4%
Taiwan	22249	21968	281	1.3%
Shanghai	3432	3420	13	0.4%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9781	9784	(3)	0.0%
Alumin (\$/MT)	2682	2703	(22)	-0.8%
Zinc (\$/MT)	2973	2961	12	0.4%
Brent Crude (\$/bbl)	71	71	1	0.8%
Gold (\$/Ounce)	2987	2984	3	0.1%
Silver (\$/Ounce)	34	34	(0)	0.0%
Light Crude (\$/bbl)	68	67	1	0.8%
N G (\$/mmbtu)	4	4	0	1.0%
Sugar (\$/MT)	542	539	3	0.5%
Rubber (Rs./kg)	195	195	0	0.0%
Baltic Dry Index	1669	1650	19	1.2%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	87.01	87.21	-0.23%
Rs./ Euro	94.66	95.18	-0.55%
Rs./Chinese Yuan	12.01	12.04	-0.25%
Yen / \$ rate	148.65	148.64	0.01%
\$ US/Euro	1.09	1.09	0.02%

Dollar Index	Current	Previous	Var(%)
Dollar Index	103.72	103.72	0.00%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22340	47840
Support 2	22270	47600
Resistance	22540	48370

Securities in Ban For Trade	
MANAPPURAM	HINDCOPPER
BSE	INDUSINDBK
SAIL	

Market Review

**US:** Stocks surged Friday but all three major indexes still closed the week in the red. President Donald Trump's budding trade war has sent jitters through markets that caused a volatile week on Wall Street.

**Asia:** Asian shares climbed after China pledged more steps to revive consumption.

**India:** Benchmark equity indices ended a holiday-shortened week lower on Thursday, with the NSE Nifty 50 extending the fall for the second day and the BSE Sensex declining for the fourth straight day. **Market is expected to open on a positive note and likely to witness positive move during the day.**

**Global Economy:** The Chinese govt on Sunday announced that it would take steps to revive consumption by boosting people's incomes, state media Xinhua News Agency reported, citing a statement from the State Council. Other measures included plans to stabilize the stock and real estate market and raising the country's birth rate, the report added.

In Feb 2025, French inflation dropped below 1% for the first time in four years, with the harmonized inflation rate at 0.9% year-on-year, down from 1.8% in Jan. This decrease is primarily due to a sharp drop in energy prices and slower rises in services, manufactured goods, and tobacco prices. However, food price inflation saw a slight acceleration. On a monthly basis, the EU-harmonised consumer price index increased by 0.1% in Feb.

In February 2025, German wholesale prices increased by 1.6% compared to the same month in the previous year, according to data released by the federal statistics office. This follows a 0.9% YoY rise in Jan 2025. Additionally, German producer prices saw a 0.5% YoY increase in January 2025. These figures indicate a modest upward trend in both wholesale and producer prices in Germany during the early months of 2025.

**Commodities:** Oil prices opened about 1% higher on Monday after USA vowed to keep attacking Yemen's Houthis until the Iran-aligned group ends its assaults on shipping.

Gold firmed on Monday after touching a historic milestone last week, as geopolitical tensions, jitters about tariffs escalating trade frictions, and increased hopes of interest rate cuts from the Fed continued to fuel safe-haven demand.

**Currency:** The U.S. dollar hovered close to a five-month low against its major peers on Monday, pressured by Trump's erratic trade policies and a run of soft macroeconomic data.

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	16720	2605	17273	2749	(144)	295102	45967	285753	44655	9349	1312
Index Option	13315277	2235441	13767082	2310715	(75274)	2299629	367712	3310083	540030	(1010454)	(172318)
Stock Future	249824	14477	286458	16484	(2007)	5690410	327504	5683842	329483	6568	(1979)
Stock Option	759761	46932	784264	48280	(1348)	1317722	73000	1264941	70423	52781	2577
<b>Total</b>	<b>14341582</b>	<b>2299455</b>	<b>14855077</b>	<b>2378228</b>	<b>(78773)</b>	<b>9602863</b>	<b>814183</b>	<b>10544619</b>	<b>984591</b>	<b>(941756)</b>	<b>(170408)</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
6-Mar-25	13118	15757	(2639)
7-Mar-25	9790	13005	(3215)
10-Mar-25	12337	12835	(498)
11-Mar-25	13979	14118	(139)
12-Mar-25	13337	14747	(1410)
<b>Month to date- Mar</b>	<b>100135</b>	<b>118124</b>	<b>(17989)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
7-Mar-25	8635	10671	(2035)
10-Mar-25	9925	10410	(485)
11-Mar-25	8214	11038	(2824)
12-Mar-25	13089	14717	(1628)
13-Mar-25	11601	12394	(793)
<b>Month to date-Mar</b>	<b>95091</b>	<b>116322</b>	<b>(21231)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
7-Mar-25	10453	8133	2320
10-Mar-25	9591	9328	264
11-Mar-25	10896	8894	2002
12-Mar-25	11803	10293	1510
13-Mar-25	10032	8309	1724
<b>Month to date-Mar</b>	<b>112007</b>	<b>85556</b>	<b>26450</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
6-Mar-25	2599	2449	150
7-Mar-25	3060	1644	1416
10-Mar-25	3303	3544	(240)
11-Mar-25	3497	1491	2005
12-Mar-25	6412	3284	3128
<b>Month to date- Mar</b>	<b>28814</b>	<b>16557</b>	<b>12257</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1424	35%	907	31%
Decline	2561	62%	1962	67%
Unchanged	120	3%	51	2%

Market Turnover	13-Mar	12-Mar	Var (%)
BSE Cash	4388	4883	-10%
NSE Cash	72308	85532	-15%
NSE Futures	77676	102850	-24%
NSE Options	42949468	22715250	89%
Total (Rs.Cr)	43103839	22908514	88%

Volatility Index	13-Mar	12-Mar
Volatility Index	13.28	13.69

Index PE - TTM	13-Mar	Yr. High	Yr. Low
Sensex	20.6	25.7	20.3
Nifty	19.9	24.4	19.6

Corporate News

**G R Infra emerges as selected bidder for NHAI project worth Rs 4,263 Cr**

Company has been selected as the preferred bidder for the Agra-Gwalior Greenfield Road project, valued at ₹4,262.78 cr. The project involves developing a six-lane, access-controlled highway connecting Deori village in Agra to Susera village in Gwalior, spanning UP, Rajasthan, and MP. (NDTV)

**Welspun Specialty Solutions wins ₹231.77 cr bid for BHEL's supercritical thermal power projects**

The company has been declared the lowest bidder by BHEL, Trichy, for a contract valued at approximately ₹231.77 cr. The project involves supplying around 4,050 tonnes of stainless steel seamless boiler tubes for supercritical thermal power projects. The formal contract will be awarded following BHEL's internal approval process. (NDTV)

**Infosys settles six class-action lawsuits against US subsidiary for \$17.5 mn**

The company, agreed to a \$17.5 mn settlement to resolve six class-action lawsuits stemming from a Nov 2023 cyberattack that compromised data of approximately 6 mn individuals. The settlement awaits court approval and aims to address all allegations without admitting liability. (ET)

Economy

**Tamil Nadu announces special package for paddy growers, international exposure visit for farmers**

Tamil Nadu has announced a ₹102 cr special package to boost paddy cultivation and food grain production during the Kar, Kuruvai, and Sornavari seasons in 29 non-Cauvery Delta districts. The package offers subsidies for machine planting and certified seeds. (ET)

**India-New Zealand FTA talks back on track after 10 years**

India and New Zealand have agreed to resume negotiations for a Free Trade Agreement (FTA), reviving discussions that stalled in 2015 due to disagreements in sectors like dairy and agriculture. (ET)

International

**Australia's Ramelius and Spartan to merge to form a \$2.7 bln gold producer**

Australian gold miners Ramelius Resources and Spartan Resources have agreed to merge, creating a combined entity valued at approximately \$2.7 bln. This strategic move aims to enhance operational efficiencies and strengthen their position in the gold mining industry. (Inv)

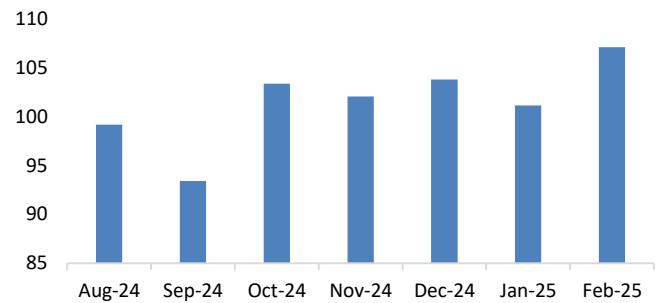
Top 5 Nifty Gainers	13-Mar	12-Mar	Var(%)
BEL	280	277	1.2%
SBIN	728	723	0.7%
NTPC	332	330	0.5%
CIPLA	1462	1454	0.5%
ICICIBANK	1250	1244	0.5%
Top 5 Nifty Losers	13-Mar	12-Mar	Var(%)
SHRIRAMFIN	620	637	-2.7%
HEROMOTOCO	3529	3610	-2.2%
TATAMOTORS	656	668	-1.9%
HINDALCO	677	690	-1.8%
INDUSINDBK	672	685	-1.8%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	73829	-0.3%	-0.7%	-2.9%	1.6%
MIDCAP	39063	-0.8%	-2.4%	-2.2%	2.1%
SMLCAP	43845	-0.6%	-3.1%	-2.9%	4.4%
AUTO	46246	-1.0%	-1.5%	-5.8%	-0.2%
BANKEK	55313	0.1%	-0.4%	-1.2%	4.7%
Capital Goods	57757	-0.1%	-1.5%	1.2%	1.6%
FMCG	18820	-0.2%	-0.1%	-1.9%	-2.9%
Health Care	39295	-0.2%	-1.0%	-2.6%	15.9%
IT	35395	-0.5%	-5.6%	-12.2%	-6.7%
METAL	29744	-0.8%	-1.2%	6.9%	12.1%
Oil & Gas	23654	-0.3%	-0.7%	0.6%	-12.0%
Power	6150	0.0%	-0.6%	4.8%	-3.5%
Realty	6227	-1.8%	-2.4%	-3.8%	-5.1%

NSE USD Futures	13-Mar	12-Mar	Var (%)
Mar Expiry (Rs./\$)	85.50	85.50	0.0%
Apr Expiry (Rs./\$)	86.14	86.14	0.0%
Total Turnover (Rs. Crore)	1698	1837	-8%

Sectors	TTM PE
Auto	27.64
Auto Ancillary	37.21
Banking	12.54
Engineering	47.74
Cement	66.59
Diamonds & Jewellery	42.21
Housing Finance	23.98
Infrastructure & Const	28.3
Metals-Aluminium	24.1
Metal – Steel	16.75
Oil Expl.	8.75
Pharma	8.63
Power – Gen. Supp.	37.05
Information Tech.	26.19
Sugar	16.02
Telecom Serv. Prov.	42.62
Tyres	26.05

Chinese iron ore price (USD) (Source: Big Mint)



10 year G-Sec Yield	Current	Previous	Change
US	4.30%	4.31%	(1) bps
Japan	1.53%	1.52%	1 bps
India	6.70%	6.68%	1 bps
UK	4.67%	4.68%	(1) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	654	654	0.0%
Inflation - WPI	2.31%	2.37%	(6) bps
Inflation - CPI	3.61%	4.26%	(65) bps

India GDP	Q2FY25	Q1FY25	Var(%)
Growth	6.15%	5.58%	57 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)	-1281	-843	(437.9)

IIP Growth %	Jan-24	Jan-23	Apr-Feb
IIP	5.0	4.2	4.2
Capital Goods	7.8	3.2	5.4
Mining	4.4	6.0	3.3
Manufacturing	5.5	3.6	4.1
Electricity	2.4	5.6	5.2



**Bulk Deal As On 13/03/25**

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
511764	AASTAFIN	MORNING VINIMAY PRIVATE LIMITED	B	98036	31.6
543938	ACCELERATE	LEENA MEHTA	B	20480	122.25
543938	ACCELERATE	XTENDED BUSINESS REPORTING LIMITED	S	19840	122.25
538351	AFEL	GILANI INFRA PRIVATE LIMITED	S	100000	7.69
535719	AMPVOLTS	AV AC DC RENEW PRIVATE LIMITED	B	51684	24.91
538539	ANVRDHI	KAMALA BAI	S	108460	17.8
537766	BCP	ARUN KUMAR JAIN	S	1500000	1.85
537766	BCP	KRISHNAN	S	474000	1.69
537766	BCP	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	1541119	1.69
537766	BCP	SHARE INDIA SECURITIES LIMITED	B	500000	1.85
537766	BCP	SRESTHA FINVEST LIMITED	B	2290331	1.73
533108	BTTL	SITA NIRMAN PVT LTD	B	449975	41.62
543516	DHYANITR	BHAVIN INDRAJIT PARIKH	B	151200	12.29
543516	DHYANITR	HARSHA RAJESHBHAI JHAVERI	S	226800	12.37
537707	ETT	SAVAN RAJENDRAKUMAR PATEL	B	55685	16.98
537707	ETT	SHAILESH DHAMELIYA	S	23533	16.29
537707	ETT	SHAILESH DHAMELIYA	B	131060	16.13
532957	GOKAKTEX	ADITYA AGARWAL	S	39429	62.75
532957	GOKAKTEX	SAGUN CAPITAL	B	39429	62.75
539692	IFINSER	KAUSHAL HITESHBHAI PARIKH	B	100000	27
539692	IFINSER	SHAILESH DHAMELIYA	B	100000	27
539692	IFINSER	VICKY RAJESH JHAVERI	S	221124	26.97
539175	INDRAIND	SHAILESH DHAMELIYA	B	83906	6.93
513361	ISWL	KHAMGAON LAND DEVELOPMENT AND TRADING COMPANY PRIVATE LIMITED	S	2103554	4.6
543286	JETMALL	DIKSHIT KUMAR CHOUDHARY	S	66000	7.98
543286	JETMALL	SHAILESH PRABHAKAR DALVI	B	78000	7.98
504392	KRISHNA	JAMSON SECURITIES PRIVATE LIMITED	S	67833	32.49
504392	KRISHNA	SHAUNAK JAGDISH SHAH	B	70366	32.49
540192	LKPSEC	L K PANDAY	B	6521725	20.5
540192	LKPSEC	LKP FINANCE LIMITED	S	6521725	20.5
544287	MANGALCOMP	JINAL KALPESH DHAKAD	B	102000	40
544287	MANGALCOMP	NIKHIL MITHALAL DHAKAD HUF	S	102000	40
541352	MEGASTAR	HARIT EXPORTS LIMITED	S	73255	207.02
541352	MEGASTAR	MOHIT RAMGOPAL AGRAWAL	B	73255	207.05
526251	MIDEASTP	JASOLIYA YUG KALPESHBHAI	B	50000	12.46
526251	MIDEASTP	MANISHKUMAR RAMESHKUMAR KODWANI	B	38000	13
526251	MIDEASTP	MOLEM INVESTMENTS AND FINANCE PRIVATE LIMITED	S	88353	12.69
540809	MRCAGRO	KIRAN KUMAR KANTIBHAI SHETH	S	162538	14.05
540809	MRCAGRO	VIJAY RADHAVINOD AGRAWAL	B	153000	14.05
539402	NAKSH	MAYUR MADHUKAR PAGAR	S	70000	9.9
539402	NAKSH	SNEHA SACHIN VISPUTE	S	68101	9.9
539402	NAKSH	VISHAL MAHESH WAGHELA	B	70000	9.9
543207	NATURAL	HEMA JAYPRAKASH BHAVSAR	B	305533	14.03
522289	NMSRESRC	REKHA PASEBAND	B	16000	31.5
522289	NMSRESRC	SATISH PURUSHOTTAM PASEBAND	S	15955	31.5
543400	OMNIPOTENT	KRISHNA MURARI TEKRIWAL	B	66000	7.25
535657	OONE	KANTAMNENI HIMA BINDU	B	128000	8.62

540901	PRAXIS	INDIA OPPORTUNITIES GROWTH FUND LTD - PINEWOOD STRATEGY	B	750000	12.88
511557	PROFINC	NIRMAL LUNKAR	S	2313915	4.5
511116	QUADRANT	DEVI TRADERS LLP	S	8256191	0.39
511116	QUADRANT	ISHAAN TRADEFIN LLP	B	6000000	0.39
541945	RANJEET	RAMESHBHAISHAMBHUBHAIDOMADIYA	S	62000	39
542599	ROOPSHRI	AMRUTLAL GORDHANDAS THOBHANI	S	120000	40
542599	ROOPSHRI	DIPSINH RANJITSINH SOLANKI	S	48000	40
542599	ROOPSHRI	DISSEMINATE MULTIMEDIA PRIVATE LIMITED	B	102000	40
542599	ROOPSHRI	SURABHI JYOTI MARKETING PRIVATE LIMITED	B	48000	40
530977	SKCIL	HAS LIFESTYLE LIMITED	S	88000	143
530977	SKCIL	ULTRA SIGMA PRIVATE LIMITED	B	88000	143
500285	SPICEJET	AJAY SINGH	S	11538462	45.34
526133	SUPERTEX	SUJIT KRISHNA PUTHRAN	S	63120	6.98
531190	TAVERNIER	SILVERSTONE CONSULTANCY SERVICES PRIVATE LIMITED	S	100000	50.02
541228	TRL	PRABODH AGRAWAL	S	59800	223.7
539097	URSUGAR	RAMESH CHANDU KOTI	B	360000	5.05
539097	URSUGAR	RAMESH KOTI (HUF)	S	360000	5.05
540729	VANTABIO	BOSCO ARMANDO MENEZES	S	63750	30.75
540729	VANTABIO	EMILY BOSCO MENEZES	B	63750	30.75
541400	ZIMLAB	ELIZABETH MATHEW	B	3995324	81.71
541400	ZIMLAB	MATHEW CYRIAC	S	3995324	81.71

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ACEINTEG	Ace Integrated Solu. Ltd.	ANSHU AGGARWAL	SELL	108560	21.1
ACEINTEG	Ace Integrated Solu. Ltd.	ANSHUL AGGARWAL	BUY	108560	21.09
AGARWALFT	Agarwal Float Glass I Ltd	BHAVNA GROVER	BUY	39000	44
AGARWALFT	Agarwal Float Glass I Ltd	MANISH GROVER	SELL	37500	44
AKG	AKG Exim Limited	KALAPI VINIT NAGADA	BUY	454141	13.26
AKG	AKG Exim Limited	MLH VENTURES LLP	SELL	469374	13.26
ASHALOG	Ashapura Logistics Ltd	KINGSMAN WEALTH FUND PCC - KIF II	SELL	70000	75.5
ASHALOG	Ashapura Logistics Ltd	LC RADIANCE FUND VCC	BUY	70000	75.5
BULKCORP	Bulkcorp International L	A S ENTERPRISE	SELL	54000	70
C2C	C2C Advanced Systems Lt	PELICAN PORTFOLIO SERVICES PRIVATE LIMITED	SELL	100200	289.91
C2C	C2C Advanced Systems Lt	VBCUBE VENTURES FUND	BUY	84000	290.15
CAREERP	Career Point Limited	CHANDRA MOULI SARMA MAGANTI	SELL	97673	342.89
CAREERP	Career Point Limited	MAGANTI SAKET	BUY	94813	342.2
ENVIRO	Envirotech Systems Ltd	CINCO STOCK VISION LLP	SELL	100000	95.98
ENVIRO	Envirotech Systems Ltd	SETU SECURITIES PRIVATE LIMITED	BUY	100000	96
GENSOL	Gensol Engineering Ltd	VIRTUE FINANCIAL SERVICES PRIVATE LIMITED	SELL	440492	265.72
MOKSH	Moksh Ornaments Limited	INVESTI GLOBAL OPPORTUNITY FUND PCC - CELL 1	BUY	600000	12.65
MOKSH	Moksh Ornaments Limited	PINE OAK GLOBAL FUND	SELL	588720	12.65
CBZAAR	Net Avenue Technologies L	ASHOK RAMCHANDRA MITTAL	SELL	200000	6.9
CBZAAR	Net Avenue Technologies L	NARESH RAMCHANDRA MITTAL	BUY	200000	6.9
SESCO	Senco Gold Limited	SARAVANA SECURITIES D.SATHYAMOORTHY	SELL	1600000	258.8
SESCO	Senco Gold Limited	SSPL SECURITIES PRIVATE LIMITED	BUY	1600000	258.81

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