

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	39132	39069	62	0.2%
Dow Futures	39125	39189	(64)	-0.2%
Nasdaq	15997	16042	(45)	-0.3%
FTSE	7706	7684	22	0.3%
Nikkei	39296	39099	197	0.5%
Hang Seng	16643	16726	(83)	-0.5%
Gift Nifty	22235	22276	(41)	-0.2%
Straits Singapore	3156	3185	(29)	-0.9%
South Korea	2654	2668	(13)	-0.5%
Taiwan	18907	18889	18	0.1%
Shanghai	2989	3005	(16)	-0.5%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8568	8585	(17.0)	-0.2%
Alumin (\$/MT)	2180	2198	(18.0)	-0.8%
Zinc (\$/MT)	2405	2387	18.5	0.8%
Brent Crude (\$/bbl)	81.3	81.6	(0.3)	-0.4%
Gold (\$/Ounce)	2031	2035	(4.5)	-0.2%
Silver (\$/Ounce)	22.8	23.0	(0.2)	-0.7%
Light Crude (\$/bbl)	76.2	76.5	(0.3)	-0.4%
N G (\$/mmbtu)	1.7	1.6	0.1	4.6%
Sugar (\$/MT)	612.1	619.7	(7.6)	-1.2%
Rubber (Rs./kg)	166.0	165.0	1.0	0.6%
Baltic Dry Index	1866	1752	114.0	6.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	82.95	82.85	0.13%
Rs./ Euro	89.73	89.91	-0.21%
Rs./Chinese Yuan	11.52	11.53	-0.03%
Yen /\$ rate	150.49	150.51	-0.01%
\$ US/Euro	1.08	1.08	-0.06%

Dollar Index	Current	Previous	Var(%)
Dollar Index	104.01	103.94	0.07%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22170	46600
Support 2	22100	46370
Resistance	22300	47200

Securities in Ban For Trade	
ASHOKLEY	BALRAMCHIN
ABFRL	BIOCON
CANBK	GMRINFRA
GNFC	HINDCOPPER
SAIL	ZEEL
RBLBANK	PEL
PVRINOX	

Market Review

US: U.S. stocks closed mostly higher Friday, with the Dow Jones Industrial Average and S&P 500 both eking out fresh record highs as megacap chip maker Nvidia Corp. extended its rally.

Asia: Asian shares were taking a breather near seven-month highs on Monday as investors awaited inflation data from the United States, Japan and Europe that will help refine expectations for future rate moves.

India: After hitting a fresh record high of 22,298 in early deals, the benchmark Nifty50 index succumbed to profit booking in the second half dragged by IT and select financial shares.

Market is expected to open on a flattish note and likely to witness range bound move during the day.

Global Economy: China's trade with its major partners fell in 2023 — its annual exports dipped for the first time in seven years. Although there have been parts of overall trade with China that have declined, the country's engagement and importance in the global value chain has not diminished, said ADB's chief economist.

Singapore consumer price index inflation grew at its slowest pace in more than two years in January, aided by decreasing fuel and housing costs, while tight monetary conditions saw a decline in recreational spending. Headline CPI inflation grew 2.9% year-on-year in January, official data showed.

Commodities: Gold price trades in negative territory during the early Asian trading hours on Monday. However, the uncertainties surrounding Fed's interest rate might lift the yellow metal ahead of the Core Personal Consumption Expenditures Price Index (Core CPI) on Thursday. Gold price is trading at \$2,034, losing 0.13% on the day.

Oil prices fell in early Asian trading on Monday, extending losses from the previous session after oil ended the week 2-3% lower amid market concerns that higher-than-expected inflation could delay U.S. interest rate cuts.

Currency: The dollar was on the front foot on Monday ahead of a packed week filled with key economic releases that will provide further clues on the global interest rate outlook, with a U.S. inflation reading taking centre stage. The dollar index was last 0.04% higher at 104.01.

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	62470	5353	64859	5489	(136)	296850	26044	303823	26607	(6973)	(563)
Index Option	14290465	1201244	14337358	1207635	(6391)	3872571	338550	2860608	247685	1011963	90865
Stock Future	411042	35007	367265	31511	3496	3132659	255946	3135352	255553	(2693)	393
Stock Option	612900	53497	604929	52762	735	551285	47383	550924	47316	361	67
Total	15376877	1295101	15374411	1297397	(2296)	7853365	667923	6850707	577161	1002658	90762

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
15-Feb-24	15021	13878	1143
19-Feb-24	23871	23698	173
20-Feb-24	15008	12034	2974
21-Feb-24	17007	16614	394
22-Feb-24	14613	14801	(188)
Month to date-Feb	230823	232987	(2164)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
19-Feb-24	10168	10923	(755)
20-Feb-24	14871	16206	(1336)
21-Feb-24	17081	16796	285
22-Feb-24	14377	15787	(1410)
23-Feb-24	15747	14471	1276
Month to date- Feb	251302	267159	(15857)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
19-Feb-24	8081	7628	453
20-Feb-24	10665	9174	1491
21-Feb-24	10152	10563	(412)
22-Feb-24	10473	8649	1824
23-Feb-24	8556	8380	177
Month to date-Feb	198622	177696	20926
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
15-Feb-24	1553	695	858
19-Feb-24	1140	948	191
20-Feb-24	2402	563	1839
21-Feb-24	1111	1608	(497)
22-Feb-24	1273	776	497
Month to date-Feb	33752	17755	15997

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2005	51%	1307	50%
Decline	1833	47%	1202	46%
Unchanged	98	2%	85	3%

Market Turnover	23-Feb	22-Feb	Var (%)
BSE Cash	8815	8143	8%
NSE Cash	104812	101759	3%
NSE Futures	178445	173798	3%
NSE Options	13012214	57415525	-77%
Total (Rs.Cr)	13304286	57699224	-77%

Volatility Index	23-Feb	22-Feb
Volatility Index	14.97	15.20

Index PE - TTM	23-Feb	Yr. High	Yr. Low
Sensex	25.0	26.0	21.8
Nifty	22.9	28.8	20.0

Corporate News

Sona Comstar executes definitive documents with Cleanmax Enviro Energy

Sona Comstar executed definitive documents with Cleanmax Enviro Energy for setting up a captive power-generating facility in Maharashtra with a solar capacity of 4.00 MWp. (BQ)

Shakti Pumps bags order worth Rs 84 cr from HAREDA

Shakti Pumps (India) has received work order from Haryana Renewable Energy Department (HAREDA) for supply of 2,443 pumps under KUSUM-3 scheme. The total consideration of order is Rs 84.30 crore and it will be executed within 90 days from the date of issue of work order. (BS)

Zurich Insurance company to acquire 70% stake in Kotak General for Rs. 5560 crore in single tranche

Zurich Insurance company will acquire a 70 % stake in Kotak General Insurance for Rs. 5,560 crore in a single tranche. Zurich Insurance had earlier announced of an initial acquisition of 51 % and a remaining 19 % in three years. Kotak Mahindra Bank said the other terms of the transaction remain unchanged. (Mint)

Economy

Indian Household Spending More Than Doubled Over The Decade

Indian households are spending more money than they did ten years ago, and this spending has more than doubled over the decade as per govt statement. The Ministry of Statistics and Programme Implementation released a factsheet on the Household Consumption Expenditure Survey 2022-23. The Average monthly per capita consumption expenditure in rural and urban areas at current prices for the survey period Aug 2022 - July 2023 is Rs. 3,773 and Rs. 6,459, respectively. Meanwhile, during the year 2011-12, it was at Rs. 2,008 for rural and Rs. 3,510 for urban areas. (BQ)

Odisha Government Approves 27 New Industrial Projects Worth Rs 6,134 crore

The Odisha govt has approved 27 new industrial projects to the tune of Rs 6,134 crore across sectors. The potential sectors include aluminium, renewable power, manufacturing, aerospace and defence, food processing, apparel and textiles and IT infrastructure. The proposed projects are likely to create employment for 42,275 people. (BQ)

International

Ryanair may have to cut summer flights due to further Boeing delays

Ryanair will receive even fewer Boeing aircraft by the end of June than previously expected, potentially prompting the budget carrier to cut its summer schedule at the busiest time of the year. The airline is the first in Europe to warn of disruption due a deepening crisis at Boeing. (Inv)

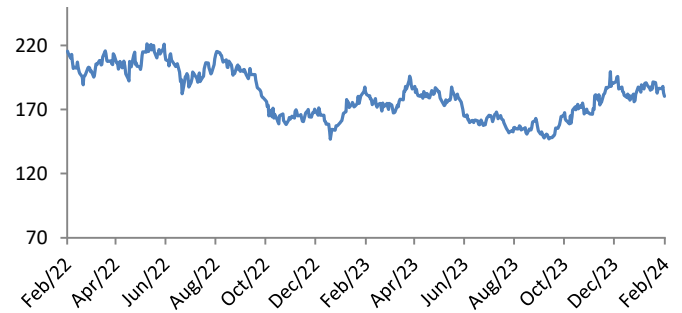
Top 5 Nifty Gainers	23-Feb	22-Feb	Var(%)
BAJAJFINSV	1617	1593	1.5%
SBILIFE	1529	1510	1.3%
DRREDDY	6442	6364	1.2%
TITAN	3692	3652	1.1%
HDFCLIFE	581	575	1.1%
Top 5 Nifty Losers	23-Feb	22-Feb	Var(%)
BPCL	618	626	-1.3%
HCLTECH	1666	1686	-1.2%
MARUTI	11536	11658	-1.0%
ASIANPAINT	2986	3017	-1.0%
JSWSTEEL	821	829	-0.9%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	73143	0.0%	1.0%	3.5%	23.0%
MIDCAP	39934	0.3%	0.0%	5.8%	65.2%
SMLCAP	46033	0.5%	0.8%	3.8%	66.9%
AUTO	47451	0.1%	1.0%	11.3%	60.7%
BANKEX	53195	-0.3%	1.1%	4.8%	17.6%
Capital Goods	56732	1.2%	1.3%	-0.3%	66.2%
FMCG	19607	-0.1%	1.5%	-1.6%	20.1%
Health Care	35752	0.1%	0.7%	8.4%	62.5%
IT	38628	-0.1%	-1.1%	3.8%	27.7%
METAL	27397	-0.3%	-0.8%	4.9%	38.9%
Oil & Gas	28360	-0.8%	-1.9%	15.0%	64.7%
Power	6613	0.1%	1.4%	7.9%	101.3%
Realty	7255	0.9%	4.1%	11.5%	138.0%

NSE USD Futures	23-Feb	22-Feb	Var (%)
Feb Expiry (Rs./\$)	82.89	82.85	0.0%
March Expiry (Rs./\$)	82.94	82.86	0.1%
Total Turnover (Rs. Crore)	25683	33270	-23%

Sectors	TTM PE
Auto	30.69
Auto Ancillary	44.77
Banking	15.97
Engineering	43.34
Cement	40.38
Diamonds & Jewellery	80.68
Housing Finance	20.21
Infrastructure & Const	41.26
Metals-Aluminium	18.66
Metal - Steel	16.65
Oil Expl.	12.78
Pharma	47.09
Power – Gen. Supp.	20.71
Information Tech.	34.67
Sugar	15.63
Telecom Serv. Prov.	75.22
Tyres	28.7

Arabica Coffee Prices (\$/lb.) (Source: BBG)



10 year G-Sec Yield	Current	Previous	Change
US	4.23%	4.25%	(1) bps
Japan	0.71%	0.72%	(1) bps
India	7.08%	7.07%	1 bps
UK	4.04%	4.11%	(7) bps
Libor 3 Mths	5.59%	5.59%	1 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation - WPI	0.27%	0.73%	(46) bps
Inflation - CPI	5.10%	5.69%	(59) bps

India GDP	Q2FY24	Q1FY24	Var(%)
Growth	7.60%	7.80%	(20) bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.50%	6.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.50%	4.50%	0 bps
O/S Banking System Liquidity (Rs bn)	-2574	-2787	212.2

IIP Growth %	Dec-23	Dec-22	YTD
IIP	3.8	5.1	5.8
Mining	5.1	10.1	8.6
Manufacturing	3.9	3.6	5.6
Electricity	1.2	10.4	6.3

Bulk Deal As On 23/02/24

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539661	ACEMEN	APURVABHAI DILIPBHAI SHAH	S	19904	47.55
539506	ADCON	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	1015248	1.4
538351	AFEL	ANUPREET KAUR SARABJIT KEER	S	89962	6.84
535916	ALSL	ANISH DILIP SHAH	S	200000	46.94
539277	ALSTONE	AVAIL FINANCIAL SERVICES LIMITED	S	76440000	0.83
539277	ALSTONE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	13530261	0.81
539277	ALSTONE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	11011631	0.82
539277	ALSTONE	SPARK FINANCE	B	12500000	0.83
539277	ALSTONE	TOPGAIN FINANCE PRIVATE LIMITED	S	18500000	0.87
539277	ALSTONE	TOPGAIN FINANCE PRIVATE LIMITED	B	29627101	0.82
539301	ARVSMART	ICICI PRUDENTIAL EQUITY OPPORTUNITIES FUND	B	465000	582
539301	ARVSMART	KAUSALYA REALSERVE LLP .	S	700000	582.02
538576	BHANDERI	JOINDRE CAPITALS SERVICES LTD	S	15600	127.7
538576	BHANDERI	SUBHASH AGARWAL	B	15600	127.7
530249	BRIDGESE	B.M. HOUSE (INDIA) LIMITED	S	20000	19.25
530249	BRIDGESE	HARSHAD AMRUTLAL PANCHAL	B	25539	19.25
539304	CANOPYFIN	BNM FINCORP	B	100000	89.06
542934	CBPL	BEENA JAIN	S	47000	145.3
540681	CHOTHANI	DHIRENDRA TRIPATHI	B	35000	30.25
540681	CHOTHANI	YAJUSH VIBHAVA MISHRA	S	40000	30.26
512379	CRESSAN	GEETANJALI GUNAJI MEDHEKAR	S	3676063	22.96
512379	CRESSAN	GEETANJALI GUNAJI MEDHEKAR	B	3737577	23.05
512441	ENBETRD	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	88075	13.91
512441	ENBETRD	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	B	250000	13.91
512441	ENBETRD	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	223842	13.91
535917	GCMCOMM	SULEKHARANI	B	12000	9.31
535917	GCMCOMM	SULEKHARANI	S	60000	8.91
544108	GPPL	CHIRAG L GANDHI	S	16800	141.45
543286	JETMALL	R D SHAH STOCK BROKERS PRIVATE LIMITED	S	84000	17
543286	JETMALL	SHRENA KALPESH SHAH	B	84000	17
511131	KAMANWALA	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	73835	16.82
511131	KAMANWALA	VARSHA CHUGH	B	85653	16.79
590068	KHAITANLTD	LATHE DERIVATIVES TRADING PRIVATE LIMITED .	B	33000	95.49
532924	KOLTEPATIL	NARESH ANIRUDHA PATIL	S	1520088	487.81
532924	KOLTEPATIL	WHITEOAK CAPITAL MUTUAL FUND	B	409834	487.5
539938	MIL	ATULBHAI AMRITLAL MEHTA	B	90000	68.95
539938	MIL	MEHTA ATULKUMAR AMRITLAL HUF	S	130000	68.83
514324	OMNITEX	PIRAMAL NEXTGEN INDUSTRIES PRIVATE LTD	S	30000	158.1
514324	OMNITEX	SHANID	B	37500	158.1
531254	OPTIFIN	NIRBHAY FANCY VASSA	S	61000	94.15
543637	PACE	SHAIVAL D GANDHI	S	158400	27.5
531280	PANKAJPO	GARNET INTERNATIONAL LIMITED	S	33081	8.26
526773	PRESSURS	MONA LAROA	B	2500000	11.29
519191	RGRL	HEMA JAYPRAKASH BHAVSAR	S	53000	10.82
526492	RISHIROOP	COUNTER CYCLICAL INVESTMENTS PRIVATE LIMITED	S	49728	205.94
538875	SELLWIN	RAJNIKANT ARVINDBHAI RAVAL	B	60000	14.98
538975	SHREESEC	FABER TREXIM PRIVATE LIMITED	S	14500000	0.38
538975	SHREESEC	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	8707691	0.38

538923	SOFCOM	AMAN GARG	B	30676	56.35
533166	SUNDARAM	HI GROWTH CORPORATE SERVICES PVT LTD	S	3648053	3.72
533166	SUNDARAM	HI GROWTH CORPORATE SERVICES PVT LTD	B	1945330	3.77
532869	TARMAT	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	133615	132.4
532869	TARMAT	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	83615	129.73
539310	THINKINK	NIKHIL RAJESH SINGH	S	501162	96.5
539310	THINKINK	NIKHIL RAJESH SINGH	B	431211	95.29
539310	THINKINK	SUNFLOWER BROKING PRIVATE LIMITED	B	183033	97.07
511523	VEERHEALTH	ABHINAVGOSWAMI	S	149738	29.81
511523	VEERHEALTH	ABHINAVGOSWAMI	B	149738	29.52
511523	VEERHEALTH	ANKIT MAHESHBHAI SHAH	S	187000	28.05
511523	VEERHEALTH	ANKIT MAHESHBHAI SHAH	B	187000	27.22
511523	VEERHEALTH	KRUPA HARSH JAIN	S	500000	27.31
511523	VEERHEALTH	MATALIA STOCK BROKING PRIVATE LIMITED	S	105319	28.99
511523	VEERHEALTH	MATALIA STOCK BROKING PRIVATE LIMITED	B	105319	28.71
511523	VEERHEALTH	MONIKA SHARMA	B	107000	28.91
542654	VRFILMS	MADHUSUDHAN GUNDA	S	70000	37.82

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AHLADA	Ahlada Engineers Limited	K I VARAPRASAD REDDY	SELL	68407	124.64
AMIORG	Ami Organics Limited	SAGEONE INVESTMENT ADVISORS LLP	BUY	250000	1075
ATMASTCO	Atmastco Limited	ASHWIN STOCKS AND INVESTMENT PRIVATE LIMITED	BUY	160000	91
ATMASTCO	Atmastco Limited	ASNANI STOCK BROKER PRIVATE LIMITED - ERROR ACCOUNT	SELL	308800	95.55
ATMASTCO	Atmastco Limited	HEMANT KADVABHAI BHOOT	BUY	182400	91.48
ATMASTCO	Atmastco Limited	ROHAN GUPTA	BUY	286400	91.25
ATMASTCO	Atmastco Limited	VINEY EQUITY MARKET LLP	BUY	124800	91.82
BGREENERGY	BGR Energy Systems Ltd	SASIKALA RAGHUPATHY	SELL	2416344	89.59
INM	Interiors & More Limited	ASTORNE CAPITAL VCC ARVEN	SELL	36000	270
INM	Interiors & More Limited	EPITOME TRADING AND INVESTMENTS	BUY	45600	281.18
INM	Interiors & More Limited	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	96000	270
INM	Interiors & More Limited	RAJASTHAN GLOBAL SECURITIES PVT LTD	SELL	187800	278.01
INM	Interiors & More Limited	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED .	BUY	66000	282.25
KTL	Kalahridhaan Trendz Ltd	ASHWIN STOCKS AND INVESTMENT PRIVATE LIMITED	BUY	90000	49.5
KTL	Kalahridhaan Trendz Ltd	BISHAL MORE	SELL	183000	49.5
KTL	Kalahridhaan Trendz Ltd	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	90000	49.5
KTL	Kalahridhaan Trendz Ltd	MOUNTAIN VENTURES	BUY	87000	49.5
KTL	Kalahridhaan Trendz Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	108000	47.15
KTL	Kalahridhaan Trendz Ltd	NEETU BAFNA	BUY	330000	47.46
KTL	Kalahridhaan Trendz Ltd	NIKHIL RAJESH SINGH	BUY	234000	47.15
KTL	Kalahridhaan Trendz Ltd	PANKAJ BAFNA	BUY	90000	47.15
KTL	Kalahridhaan Trendz Ltd	PARMOD KUMAR MITTAL	SELL	105000	47.15
KTL	Kalahridhaan Trendz Ltd	PURAV VIRATBHAI SHAH	SELL	105000	47.15
KTL	Kalahridhaan Trendz Ltd	SETU SECURITIES PVT LTD	BUY	132000	49.5
KTL	Kalahridhaan Trendz Ltd	SUNFLOWER BROKING PRIVATE LIMITED	SELL	252000	49.5
KTL	Kalahridhaan Trendz Ltd	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED .	BUY	120000	49.5
KHAITANLTD	Khaitan (India) Ltd.	LATHE DERIVATIVES TRADING PRIVATE LIMITED .	SELL	33000	94.29
KHAITANLTD	Khaitan (India) Ltd.	SAPTARSHI DEY	BUY	52879	95.15
KHAITANLTD	Khaitan (India) Ltd.	SUMANCHEPURI	SELL	30000	91.41
MOKSH	Moksh Ornaments Limited	SHABBIR NAZMUDDIN PARATHA	SELL	372930	22.5
OLECTRA	Olectra Greentech Limited	UJWAL KUMAR PAGARIYA	SELL	550000	2096
OSIAHYPER	Osia Hyper Retail Ltd	MINERVA VENTURES FUND	BUY	1000000	49.2
OSIAHYPER	Osia Hyper Retail Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	1500000	49.88
PEARLPOLY	Pearl Polymers Ltd	SAURABH SANTOSH RATHI	BUY	100000	40.18
RAJMET	Rajnandini Metal Limited	HET RAM	SELL	1700000	13.65
RBMINFRA	Rbm Infracon Limited	SARABPREET KAUR	SELL	63000	683.1
SUNDARAM	Sundaram Multi Pap Ltd	ANUP BIRMANAND AGRAWAL	SELL	2394960	3.82
SUNDARAM	Sundaram Multi Pap Ltd	DEEPIKA DAMJI PATEL CHAUDHARY	SELL	2579990	3.65
SUNDARAM	Sundaram Multi Pap Ltd	KANTA HARGOVIND BHURA	SELL	4215000	3.97
SUNDARAM	Sundaram Multi Pap Ltd	MADHUMATI ARVIND SHAH	SELL	2580000	3.9
SUNDARAM	Sundaram Multi Pap Ltd	PREMJI JIVRAJ SAVLA	SELL	2580000	3.57
TARMAT	Tarmat Limited	LATHE DERIVATIVES TRADING PRIVATE LIMITED .	SELL	115000	128.09
TARMAT	Tarmat Limited	UMESH PARASMAL PAGARIYA	BUY	329500	131.04
TCL	Thaai Casting Limited	SELVAMURTHY AKILANDESWARI	BUY	116800	180.41
TIJARIA	Tijaria Poly pipes Ltd	STATSOL RESEARCH LLP	BUY	199436	9.1

Disclosure:

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Nirmal Bang Research (Division of Nirmal Bang Securities Pvt. Ltd.)

B-2, 301/302, Marathon Innova,
Opp. Peninsula Corporate Park
Off. Ganpatrao Kadam Marg
Lower Parel(W), Mumbai-400013
Board No. : 91 22 6723 8000/8001
Fax. : 022 6723 8010