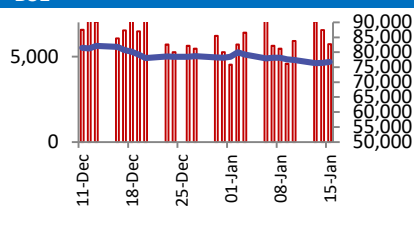
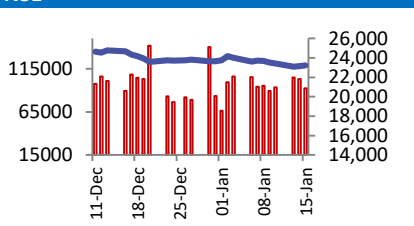


BSE		NSE																													
	<table border="1"> <tr><td>Open</td><td>76900</td></tr> <tr><td>High</td><td>76991</td></tr> <tr><td>Low</td><td>76480</td></tr> <tr><td>Close</td><td>76724</td></tr> <tr><td>Change</td><td>224</td></tr> <tr><td>Volume (Lacs)</td><td>6322</td></tr> <tr><td>Turnover (Rs.inCr)</td><td>5722</td></tr> </table>	Open	76900	High	76991	Low	76480	Close	76724	Change	224	Volume (Lacs)	6322	Turnover (Rs.inCr)	5722		<table border="1"> <tr><td>Open</td><td>23250</td></tr> <tr><td>High</td><td>23294</td></tr> <tr><td>Low</td><td>23146</td></tr> <tr><td>Close</td><td>23213</td></tr> <tr><td>Change</td><td>37</td></tr> <tr><td>Volume(Lacs)</td><td>40782</td></tr> <tr><td>Turnover(Rs.in Cr)</td><td>92453</td></tr> </table>	Open	23250	High	23294	Low	23146	Close	23213	Change	37	Volume(Lacs)	40782	Turnover(Rs.in Cr)	92453
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World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	43222	42518	703	1.7%
Dow Futures	43491	43466	25	0.1%
Nasdaq	19511	19044	467	2.5%
FTSE	8301	8202	100	1.2%
Nikkei	38552	38445	107	0.3%
Hang Seng	19453	19286	167	0.9%
Gift Nifty	23400	23390	10	0.0%
Straits Singapore	3795	3773	23	0.6%
South Korea	2528	2497	31	1.2%
Taiwan	22958	22515	443	2.0%
Shanghai	3239	3227	12	0.4%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9168	9154	14	0.1%
Alumin (\$/MT)	2602	2560	42	1.6%
Zinc (\$/MT)	2863	2863	1	0.0%
Brent Crude (\$/bbl)	82	82	0	0.3%
Gold (\$/Ounce)	2697	2696	1	0.0%
Silver (\$/Ounce)	31	31	(0)	-0.1%
Light Crude (\$/bbl)	80	80	0	0.4%
N G (\$/mmbtu)	4	4	(0)	-0.4%
Sugar (\$/MT)	473	481	(9)	-1.8%
Rubber (Rs./kg)	192	192	1	0.3%
Baltic Dry Index	1063	1080	(17)	-1.6%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	86.36	86.64	-0.32%
Rs./ Euro	89.03	88.89	0.16%
Rs./Chinese Yuan	11.78	11.82	-0.34%
Yen /\$ rate	155.71	156.47	-0.49%
\$ US/Euro	1.03	1.03	-0.02%

Dollar Index	Current	Previous	Var(%)
Dollar Index	109.27	109.27	0.00%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	23140	48670
Support 2	23070	48440
Resistance	23340	49240

Securities in Ban For Trade	
AARTIIND	ANGELONE
BANDHANBNK	HINDCOPPER
ABFRL	KALYANKJIL
LTF	RBLBANK
MANAPPURAM	

Market Review

US: U.S. stocks surged on Wednesday, with all three major indexes registering their biggest daily percentage gains in more than two months, as lower-than-expected Dec'24 core inflation data and solid earnings from major U.S. banks fueled a rally.

Asia: Stocks in the Asia-Pacific region advanced on Thursday following a surge in US markets taking overnight cues from Wall Street as easing inflation increased the prospects of rate cuts by the Federal Reserve.

India: India's benchmark indexes inched higher on Wednesday, led by energy and information technology stocks, although worries over slowing earnings and caution ahead of key U.S. inflation data capped the gains. **is expected to open on a gap up note and likely to witness range bound move during the day.**

Global economy: U.S. inflation rose to 2.9% in December, driven by gas, eggs, and used car prices, while core inflation eased slightly to 3.2%. Economists anticipate inflation to decrease slightly, despite potential inflationary policies from President-elect Trump. The Fed is expected to maintain high interest rates until inflation returns to 2%, impacting borrowing costs.

Japan's annual wholesale inflation held steady at 3.8% in December on stubbornly high food costs, highlighting persistent price pressures that may prod the central bank to raise interest rates next week.

Australian employment sped past forecasts in December thanks to a surge in part-time jobs, though the jobless rate ticked higher as more people went looking for work. Figures from the Australian Bureau of Statistics showed net employment jumped 56,300 in December from November, when it increased by a downwardly revised 28,200. That was well above market forecasts for a rise of 15,000. Annual jobs growth accelerated to a brisk 3.1%.

Commodities: Oil prices rose in Asian trade on Thursday after hitting multi-month peaks in the previous session, driven by a combination of softer U.S. inflation data, new sanctions on Russian oil, and significant drawdowns in U.S. crude inventories.

US gold prices hit more than one-month highs on Thursday in early Asian hours after data showed US core inflation rose less than expected in December, raising hopes that the Federal Reserve could ease interest rates further.

Currency: The dollar slipped on Thursday to stand just off recent peaks as cooling U.S. inflation data knocked down bond yields, while the yen hit a one-month high on rising bets on a rate hike in Japan.

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	35638	2318	31005	2131	187	442686	30826	441569	30604	1117	222
Index Option	9339245	1407729	9701915	1473278	(65549)	5641931	603026	5493004	575337	148927	27689
Stock Future	413830	24991	384165	23326	1665	5585017	343179	5521306	338994	63711	4185
Stock Option	1292674	81376	1293775	81517	(141)	1510033	92142	1464600	89042	45433	3100
Total	11081387	1516414	11410860	1580252	(63838)	13179667	1069173	12920479	1033977	259188	35196

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
8-Jan-25	10009	13738	(3729)
9-Jan-25	9085	16115	(7029)
10-Jan-25	11363	12784	(1421)
13-Jan-25	12074	16351	(4276)
14-Jan-25	14710	22477	(7766)
Month to date- Jan	108604	138911	(30307)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
9-Jan-25	8537	15708	(7171)
10-Jan-25	10097	12352	(2255)
13-Jan-25	10978	15871	(4893)
14-Jan-25	13794	21926	(8132)
15-Jan-25	11035	15569	(4533)
Month to date-Jan	111383	150299	(38916)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
9-Jan-25	16728	9088	7640
10-Jan-25	14294	10332	3962
13-Jan-25	20134	12067	8066
14-Jan-25	17837	9935	7901
15-Jan-25	14430	10747	3683
Month to date-Jan	163388	119523	43866
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
8-Jan-25	1069	7956	(6887)
9-Jan-25	3156	3875	(720)
10-Jan-25	2582	1983	600
13-Jan-25	3900	1384	2516
14-Jan-25	1156	1068	88
Month to date- Jan	19913	26699	(6786)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2121	52%	1498	52%
Decline	1848	45%	1298	45%
Unchanged	95	2%	70	2%

Market Turnover	15-Jan	14-Jan	Var (%)
BSE Cash	5722	6551	-13%
NSE Cash	92453	103215	-10%
NSE Futures	107147	127200	-16%
NSE Options	19219712	11228019	71%
Total (Rs.Cr)	19425033	11464985	69%

Volatility Index	15-Jan	14-Jan
Volatility Index	15.26	15.47

Index PE - TTM	15-Jan	Yr. High	Yr. Low
Sensex	22.2	26.0	21.8
Nifty	21.4	24.4	20.8

Corporate News

Rashi Peripherals Acquires 70% Satcom Infotech Stake in Rs 14 Cr Deal

Rashi Peripherals Ltd. will acquire a 70% stake in Satcom Infotech Pvt Ltd., a cybersecurity solution distributor. Its board had approved an investment of up to Rs 14 cr for the acquisition of equity shares in Satcom Infotech. (NDTV)

Azad Engineering Signs Rs 960 Cr Supply Agreement with Ge Vernova International

Azad Engineering Ltd. signed a long-term supply agreement of Rs 960 cr with Ge Vernova International LLC, USA. The Company will provide highly specialised, complex rotating and stationary airfoils for advanced gas turbine engines to meet the global demand in the power generation industry. (NDTV)

Hitachi Energy Board to Mull Raising Funds via Equity Shares, QIP, and Other Means

Hitachi Energy India Ltd. will consider raising funds via equity shares, qualified institutional placement, or other means in one or more tranches. However, the disclosure didn't mention the amount that the company is targeting to garner via the fundraise. (NDTV)

Economy

Indian refiners shift diesel supplies to Africa and Asia

India's diesel exports to Europe have dropped significantly, leading suppliers to shift focus to Africa and Asia. Increased refinery outputs in Europe and the US contributed to the decline. Africa now accounts for the largest share of Indian diesel exports, while overall refined product exports to Europe have decreased, with Asia and the Middle East seeing a rise. (ET)

US lifts decades-old restrictions on BARC, IGCAR and Indian Rare Earths in diplomatic breakthrough with India

The U.S. Bureau of Industry & Security has removed three Indian entities, Indian Rare Earths, IGCAR, and BARC, from its restrictive list. This move aims to boost joint research and collaboration in science and technology, particularly in the energy sector, strengthening bilateral ties and energy security. (ET)

International

Brazil's Azul signs preliminary deal to explore merger with Gol

Brazilian airline Azul SA and Abra- the majority investor in its rival Gol, said they had signed a non-binding agreement to explore the combination of their businesses in Brazil. Said combination has the potential to create Brazil's biggest airline, outpacing the local unit of Chile's LATAM Airlines (Inv)

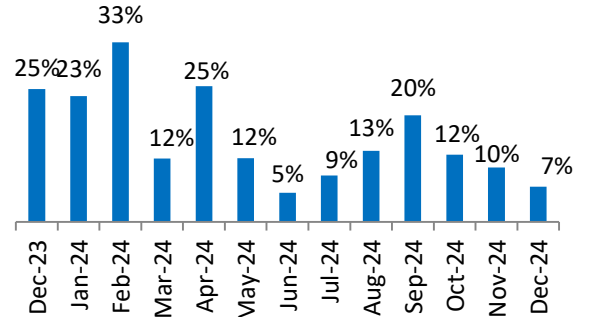
Top 5 Nifty Gainers	15-Jan	14-Jan	Var(%)
TRENT	6390	6161	3.7%
NTPC	321	310	3.5%
POWERGRID	299	290	2.9%
KOTAKBANK	1790	1751	2.2%
MARUTI	11947	11741	1.8%
Top 5 Nifty Losers	15-Jan	14-Jan	Var(%)
M&M	2960	3050	-2.9%
BAJAJFINSV	1672	1714	-2.4%
AXISBANK	1027	1052	-2.4%
BAJFINANCE	7177	7335	-2.1%
SHRIRAMFIN	533	544	-2.0%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	76724	0.3%	-1.8%	-6.1%	4.9%
MIDCAP	43345	0.1%	-5.0%	-9.9%	14.0%
SMLCAP	51573	0.3%	-5.7%	-9.9%	16.3%
AUTO	51261	-0.5%	-2.9%	-5.0%	20.3%
BANKEK	55328	0.1%	-2.3%	-9.3%	2.1%
Capital Goods	63176	0.4%	-4.8%	-13.9%	12.0%
FMCG	20240	0.0%	-2.6%	-2.7%	-1.0%
Health Care	42493	-1.2%	-5.8%	-3.7%	30.5%
IT	43077	0.7%	-0.9%	-5.1%	15.4%
METAL	27818	0.3%	-2.1%	-11.5%	4.5%
Oil & Gas	25552	-0.3%	-4.6%	-4.9%	2.8%
Power	6538	1.7%	-2.9%	-13.5%	8.7%
Realty	7261	1.6%	-9.6%	-16.7%	5.7%

NSE USD Futures	15-Jan	14-Jan	Var (%)
Jan Expiry (Rs./\$)	84.39	84.39	0.0%
Feb Expiry (Rs./\$)	84.42	84.42	0.0%
Total Turnover (Rs. Crore)	4595	6477	-29%

Sectors	TTM PE
Auto	29.76
Auto Ancillary	44.94
Banking	13.2
Engineering	47.61
Cement	84.93
Diamonds & Jewellery	56.01
Housing Finance	25.11
Infrastructure & Const	34.86
Metals-Aluminium	35.79
Metal – Steel	16.02
Oil Expl.	12.52
Pharma	9.65
Power – Gen. Supp.	43.6
Information Tech.	25.39
Sugar	22.1
Telecom Serv. Prov.	70.24
Tyres	27.25

TVS Motors Monthly Volume Growth (YoY)
(Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.66%	4.65%	1 bps
Japan	1.25%	1.26%	(1) bps
India	6.81%	6.82%	(1) bps
UK	4.73%	4.89%	(16) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	635	635	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	6.50%	6.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.00%	4.50%	(50) bps
O/S Banking System Liquidity (Rs bn)	-1958	-2019	60.8

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	22.89	9229895	22.51	13923562	1.69%	1	1976.81	1949.65	1.4%
Wipro	3.44	4316048	3.40	2813907	1.18%	1	297.08	292.65	1.5%
Dr.Reddy's	15.32	2361510	15.26	1923968	0.39%	1	1323.06	1337.20	-1.1%
ICICI Bank	28.68	2671447	28.44	3507828	0.84%	2	1238.42	1238.25	0.0%
HDFC Bank	59.16	2903923	58.53	3151140	1.08%	3	1703.04	1643.05	3.7%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	40.40	39.70	0.7	1.8%
RIL	58.00	57.00	1.0	1.8%
SBI	87.00	86.00	1.0	1.2%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.90%	2.70%
Unemployment (%)	4.10%	4.20%

Interest Rate (%)	Current	Previous
Fed Rate	4.50%	4.75%

US GDP	Q2CY24	Q1CY24
Growth (QoQ Annualized)	3.10%	3.00%

China Economy Data	Current	Previous
GDP	4.60%	4.70%
Inflation – CPI (%)	0.10%	0.20%

Economic Calendar

	Date
Indian GDP Data	28 Feb
Indian Inflation Data CPI	12 Feb
Indian Inflation Data WPI	14 Feb
Indian Monetary Policy	07 Feb
India's Industrial Production (IIP)	12 Feb
US Inflation Data	To be announced
US GDP	30 Jan
US Unemployment Data	07 Feb
US Fed Rate	30 Jan
China GDP	17 Jan
China Inflation Data	09 Feb

Event Update

Name	Date	Purpose
Regis Industries Ltd.	16/01/25	Stock Split from Rs.10/- to Re.1/-
Arunjyoti Bio Ventures Ltd.	17/01/25	Stock Split from Rs.10/- to Re.1/-
Jai Balaji Industries Ltd.	17/01/25	Stock Split from Rs.10/- to Rs.2/-
Kitex Garments Ltd.	17/01/25	Bonus issue
Kore Digital Ltd.	17/01/25	Bonus issue
Sattva Sukun Lifecare Ltd.	17/01/25	Bonus issue
Tata Consultancy Services Ltd.	17/01/25	Rs.10.00 per share(1000%)Third Interim Dividend
Vantage Knowledge Academy Ltd.	17/01/25	Rs.0.10 per share(10%)First Interim Dividend
Nava Ltd.	20/01/25	Stock Split from Rs.2/- to Re/1/-
Angel One Ltd.	21/01/25	Interim Dividend
BN Rathi Securities Ltd.	24/01/25	Stock Split from Rs.10/- to Rs.5/-
KEI Industries Ltd.	27/01/25	Interim Dividend
Persistent Systems Ltd.	29/01/25	Interim Dividend
Godrej Consumer Products Ltd.	03/02/25	Interim Dividend
Emami Ltd.	04/02/25	Second Interim Dividend
Manba Finance Ltd.	05/02/25	Second Interim Dividend
Computer Age Management Services Ltd.	07/02/25	Interim Dividend
Page Industries Ltd.	13/02/25	Third Interim Dividend

Bulk Deal As On 15/01/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
530669	ACEENGITEC	SUDHANSHU KANDA	B	4500	204
544337	AVAX	GAURAV PALIWAL	B	6000	134.2
544337	AVAX	KN FAMILY TRUST	S	26000	140.25
544337	AVAX	NITU KANWAR	B	10000	146
526546	CHOKSILA	NEXUS GLOBAL OPPORTUNITIES FUND	B	35000	114.01
539770	DARJEELING	MAHENDRA GIRDHARILAL WADHWANI	S	95000	32.57
539770	DARJEELING	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	65000	29.47
539770	DARJEELING	VIVEK KANDA	S	32515	29.47
544331	DAVIN	DEEPAKSEETARAMJIDHOOT	B	118000	39.13
531502	ESARIND	IMRAN	S	136187	6.85
531502	ESARIND	LALITA MITTAL	B	142497	6.86
544332	FABCLEAN	EPITOME TRADING AND INVESTMENTS	B	68800	196.28
543521	FONE4	NEZONE HERBALS PVT LTD	B	100000	17.14
513337	GUJTLRM	JNSP TRADING LLP	S	1483082	13.95
513337	GUJTLRM	JNSP TRADING LLP	B	1483082	13.93
541627	HITECHWIND	ALUMALAIGUNASEKARAN	S	31754	9.96
541627	HITECHWIND	FINGROW INVESTMENT VENTURES PRIVATE LIMITED .	S	27661	9.96
541627	HITECHWIND	KARTIKBATHLA	B	48000	9.96
541627	HITECHWIND	SUDHANSHU KANDA	B	50000	9.96
538765	JSHL	MANOJ KUMAR KANDA	B	70000	6.9
543613	MAFIA	SANKAR S	S	24000	24.28
543579	NATURO	MINOLLO PRIVATE LIMITED	S	904000	6.83
543579	NATURO	VANDANA KAMAL PODAR	B	100000	7.5
531494	NAV KAR	BIYANI COMPLEX LLP	S	2702003	12.95
531494	NAV KAR	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	3000000	12.9
531494	NAV KAR	PARIMAL JASWANTRAI MEHTA	B	1800000	12.97
531494	NAV KAR	SETU SECURITIES PVT LTD	B	3000000	12.9
544330	PARMESHWAR	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	B	110000	72.32
544330	PARMESHWAR	POOJA ENTERPRISE	B	80000	72.28
541601	RAJNISH	SIDDHANT SHIRISH SHAH	S	6392986	1.07
540259	SHANGAR	SHARE INDIA SECURITIES LIMITED	S	500000	5.9
540259	SHANGAR	SHARE INDIA SECURITIES LIMITED	B	500000	5.9
540259	SHANGAR	UMA SHANKAR EXIM PRIVATE LIMITED	S	550000	5.9
540259	SHANGAR	UMA SHANKAR EXIM PRIVATE LIMITED	B	61025	5.9
540132	SIIL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	99760	16.07
540132	SIIL	PREETI BHAUKA	S	59867	15.89
539798	UMIYA	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	22550	26.72
539798	UMIYA	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	148809	26.72
539798	UMIYA	PREETI BHAUKA	B	140000	26.72
539798	UMIYA	STOCKFLAIR	S	70000	26.72
544011	VPL	RANJEETHAVINCENTLOPEZ	S	54000	57.09

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
CUBEXTUB	Cubex Tubings Ltd	ENSPIRE INSTITUTE OF PROFESSIONAL STUDIES LLP	SELL	75000	116.09
DELTIC	Delta Autocorp Limited	FINAVENUE GROWTH FUND	BUY	117000	171.38
DELTIC	Delta Autocorp Limited	ISHAAN TRADEFIN LLP	SELL	126000	159.66
DELTIC	Delta Autocorp Limited	PARADISE MOON INVESTMENT FUND-I	BUY	100000	162.35
EIFFL	Euro (I) Fresh Foods Ltd	JAINAM BROKING LIMITED	SELL	250000	188.63
EIFFL	Euro (I) Fresh Foods Ltd	MONEY LOGIX SECURITIES PVT LTD	BUY	250000	188.63
NURECA	Nureca Limited	COPTHALL MAURITIUS INVESTMENT LIMITED	BUY	116711	401.94
MOBIKWIK	One Mobikwik Systems Ltd	QUANT MUTUAL FUND SMALL CAP FUND ESCMESCO	SELL	650692	513.57
MOBIKWIK	One Mobikwik Systems Ltd	SSPL SECURITIES PRIVATE LIMITED	SELL	400000	497.16
PURPLEUTED	Purple United Sales Ltd	MERU INVESTMENT FUND PCC- CELL 1	SELL	51000	163.41
PURPLEUTED	Purple United Sales Ltd	PINE OAK GLOBAL FUND	SELL	159000	161.72
SAJHOTELS	Saj Hotels Limited	VICCO PRODUCTS BOMBAY PRIVATE LIMITED	BUY	228000	80.94
SHIVAUM	Shiv Aum Steels Limited	VENKATESHWARA INDUSTRIAL PROMOTION CO.LIMITED	BUY	110000	250
SHIVAUM	Shiv Aum Steels Limited	VINOD HARILAL JHAVERI	SELL	150000	250

Disclosure:

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