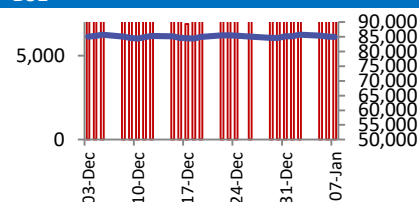
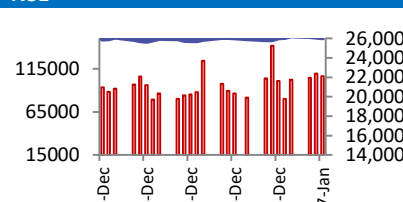


## BSE



Open	84022
High	84406
Low	83402
Close	83576
Change	-605
Volume (Lacs)	7954
Turnover (Rs.inCr)	8667

## NSE



Open	25840
High	25941
Low	25623
Close	25683
Change	-194
Volume(Lacs)	62232
Turnover(Rs.in Cr)	106747

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	49504	49266	238	0.48%
Dow Futures	49501	49726	(225)	-0.45%
Nasdaq	23671	23480	191	0.81%
FTSE	10125	10045	80	0.80%
Nikkei	51940	51940	Closed	Closed
Hang Seng	26343	26232	111	0.42%
Gift Nifty	25793	25816	(24)	-0.09%
Straits Singapore	4769	4745	25	0.52%
South Korea	4645	4586	58	1.28%
Taiwan	30581	30289	292	0.96%
Shanghai	4132	4120	11	0.27%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	12998	12721	278	2.2%
Alumin (\$/MT)	3136	3091	45	1.5%
Zinc (\$/MT)	3154	3135	19	0.6%
Brent Crude (\$/bbl)	63	63	0	0.0%
Gold (\$/Ounce)	4576	4510	67	1.5%
Silver (\$/Ounce)	83	80	3	4.0%
Light Crude (\$/bbl)	59	59	0	0.0%
N G (\$/mmbtu)	3	3	0	2.0%
Sugar (\$/MT)	426	428	(2)	-0.5%
Rubber (Rs./kg)	187	187	0	0.0%
Baltic Dry Index	1688	1718	(30)	-1.7%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	90.16	90.03	0.15%
Rs./ Euro	104.97	105.12	-0.14%
Rs./Chinese Yuan	12.93	12.92	0.04%
Yen / \$ rate	157.95	157.89	0.04%
\$ US/Euro	1.17	1.16	0.18%

Dollar Index	Current	Previous	Var(%)
Dollar Index	98.96	99.13	-0.18%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	25700	59340
Support 2	25640	59150
Resistance	25870	59700

Securities in Ban For Trade	
SAIL	SAMMAANCAP

## Market Review

**US:** US stocks closed at record highs on Friday as investors reacted to the December jobs report and awaited potential Fed guidance. The S&P 500 gained 0.6% and the Dow rose 0.5%, both hitting new highs, while the Nasdaq added 0.8%.

**Asia:** Asian shares opened in the green on Monday after US jobs data catalysed in pushing stocks to new highs in the previous session.

**India:** Indian equities ended lower for the fifth consecutive day on Friday. Nifty had fallen below the 25,700 levels. Sensex settled 604.72 points 0.72% down at 83,576.24.

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

**Global economy:** The Trump administration has threatened to indict Federal Reserve Chair Jerome Powell over Congressional testimony he gave last summer about a Fed building project, an action Powell called a pretext to gain more influence over the central bank and monetary policy.

Qatar and the United Arab Emirates will soon join a U.S.-led initiative to secure AI and semiconductor supply chains, Undersecretary of State for Economic Affairs Jacob Helberg told Reuters in an interview. The addition of those two countries is notable given the Middle East's history of political divisions and reflects a U.S.-led effort to bring Israel and Gulf states into the same technology-focused economic framework.

German Foreign Minister Johann Wadephul emphasised the importance of transatlantic relations on Sunday as he left for a trip to Washington that takes place at a delicate time due to tensions over U.S. interests in Greenland and Venezuela. Never before has it been so crucial to invest in the transatlantic partnership in order to remain capable of shaping the world order, Wadephul said in Berlin before his departure.

**Commodities:** Oil prices extended gains on Monday on growing concerns that intensifying protests in Iran could disrupt supply from the OPEC producer although efforts to quickly resume oil exports from Venezuela are limiting price gains.

Gold jumped to a record high as the US Justice Department threatened the Federal Reserve with a criminal indictment, while intensifying protests in Iran kept geopolitical tensions elevated.

**Currency:** The dollar index slipped to around 98.9 on Monday, ending a four-day rally after federal prosecutors opened a criminal investigation on Federal Reserve Chair Jerome Powell, putting the central bank's independence into question.

**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	17850	3034	36566	6230	(3196)	219063	36881	202583	34363	16480	2518
Index Option	11233042	1893237	11149913	1878694	14543	2867882	480796	2434633	411620	433249	69176
Stock Future	353893	24326	343016	23440	886	6148982	414136	6125777	416094	23205	(1958)
Stock Option	454573	31920	452224	31796	124	554153	37566	519962	35540	34191	2026
<b>Total</b>	<b>12059358</b>	<b>1952517</b>	<b>11981719</b>	<b>1940160</b>	<b>12357</b>	<b>9790080</b>	<b>969379</b>	<b>9282955</b>	<b>897617</b>	<b>507125</b>	<b>71762</b>

FII All Activity-BBG (Rs Cr)		Buy	Sell	Net
2-Jan-26		8304	7657	647
5-Jan-26		12335	11598	737
6-Jan-26		15512	15529	(16)
7-Jan-26		15080	16919	(1839)
8-Jan-26		11324	15034	(3710)
<b>Month to date- Jan</b>		<b>63888</b>	<b>71109</b>	<b>(7221)</b>
FII (Prov.) (Rs Cr)		Buy	Sell	Net
5-Jan-26		11277	11314	(36)
6-Jan-26		15061	15169	(108)
7-Jan-26		14664	16191	(1528)
8-Jan-26		11090	14457	(3367)
9-Jan-26		11093	14863	(3769)
<b>Month to date-Jan</b>		<b>72104</b>	<b>83891</b>	<b>(11787)</b>
DII (Prov.) (Rs. Cr)		Buy	Sell	Net
5-Jan-26		15566	13802	1764
6-Jan-26		17240	15491	1749
7-Jan-26		18365	15475	2889
8-Jan-26		18707	15006	3701
9-Jan-26		18481	12885	5596
<b>Month to date-Jan</b>		<b>116754</b>	<b>98851</b>	<b>17903</b>
FII Debt - BBG (Rs. Cr)		Buy	Sell	Net
2-Jan-26		2756	525	2231
5-Jan-26		2852	3535	(683)
6-Jan-26		2123	3036	(913)
7-Jan-26		5106	3047	2059
8-Jan-26		2417	3138	(721)
<b>Month to date- Jan</b>		<b>15427</b>	<b>13605</b>	<b>1821</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1062	24%	776	23%
Decline	3104	71%	2510	74%
Unchanged	176	4%	91	3%

Market Turnover	09-Jan	08-Jan	Var (%)
BSE Cash	8667	8673	0%
NSE Cash	106747	108954	-2%
NSE Futures	126456	131536	-4%
NSE Options	25521425	14751888	73%
Total (Rs.Cr)	25763295	15001052	72%

Volatility Index	09-Jan	08-Jan
Volatility Index	10.93	10.60

Index PE - TTM	09-Jan	Yr. High	Yr. Low
Sensex	23.1	24.1	20.3
Nifty	22.4	23.0	19.6

**Corporate News**

**Lloyds Engineering Works has entered into a Purchase Agreement with The Materials Works, USA.** Under the agreement, the company will be entitled to manufacture and sell unlimited EPS Gen 4 cells using the patented technology, subject to the payment of an agreed earnout to TMW for a specified period. (MC)

**NTPC has signed a shareholder agreement with Maharashtra State Power Generation Company (MAHAGENCO) for the acquisition of Sinnar Thermal Power Limited (STPL),** a company undergoing the Corporate Insolvency Resolution Process (CIRP) under the Insolvency and Bankruptcy Code, for Rs. 3,800.14 cr. STPL owns a coal-based thermal power plant with a capacity of 5 × 270 MW (1,350 MW) located at Sinnar, Nashik, Maharashtra. With this acquisition, the total installed capacity of the NTPC Group will increase to 86,987 MW, while commercial capacity will rise to 85,907 MW. (MC)

**Zydus Lifesciences** dissolved its arm, Ampliman 2, France, without liquidation effective Jan. 9. The dissolution will not impact the company's business operations. (NDTV)

**Warburg Pincus will buy a 41% stake in Lemon Tree's arm, Fleur Hotels, from APG Strategic.** Warburg Pincus will invest Rs 960 crore in Fleur Hotels, which will be listed as a separate entity on the bourses. (NDTV)

**Economy**

**The Centre has released over Rs. 83,000 cr to states for capital investment.** This is part of the special assistance scheme for capital investment. The government is confident of fully utilizing the allocation by the fiscal year end. The scheme provides interest-free loans to states for capital expenditure. (ET)

**India's credit demand is surging.** Lower taxes and supportive monetary policy are fueling investment. Outstanding bank credit has crossed a major milestone. This growth surpasses projections, indicating a strong economic rebound. Auto loans, small and mid-sized companies, and home loans are key drivers. Investment intentions are translating into spending, creating a positive environment. (ET)

**International**

**Allegiant Travel Company said that it would acquire Sun Country Airlines** in a cash-and-stock transaction valuing the leisure carrier at about \$1.5 Bn, including net debt, as U.S. airlines seek scale and network flexibility. Under the agreement, Sun Country shareholders will receive 0.1557 Allegiant shares and \$4.10 in cash for each share, valuing Sun Country at \$18.89/share, a near 20% premium to its Jan. 9 close. (Inv)

Top 5 Nifty Gainers	09-Jan	08-Jan	Var(%)
ASIANPAINT	2826	2787	1.4%
ONGC	234	231	1.2%
HCLTECH	1661	1647	0.9%
BEL	419	416	0.7%
CIPLA	1466	1461	0.3%
Top 5 Nifty Losers	09-Jan	08-Jan	Var(%)
ADANIENT	2154	2214	-2.7%
NTPC	336	344	-2.4%
JIOFIN	287	294	-2.1%
ICICIBANK	1404	1435	-2.1%
BAJAJ-AUTO	9563	9761	-2.0%

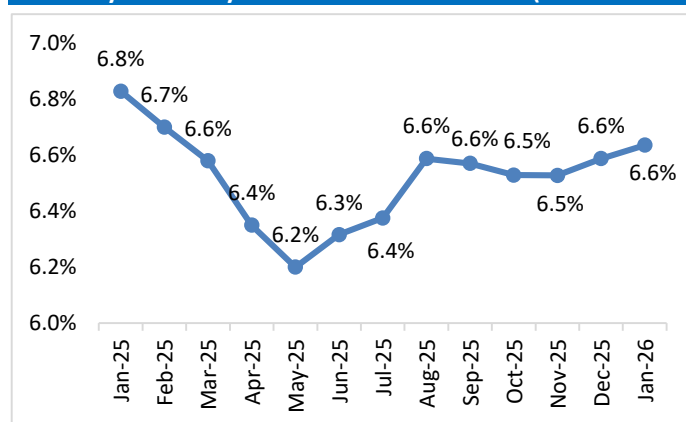
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	83576	-0.7%	-2.5%	-2.0%	8.0%
MIDCAP	46305	-0.9%	-2.6%	-0.4%	4.7%
SMLCAP	49912	-1.7%	-3.9%	-1.9%	-5.3%
AUTO	62290	-1.2%	-2.4%	0.7%	19.7%
BANKEX	66617	-0.6%	-1.3%	-0.1%	20.5%
Capital Goods	65583	-1.0%	-3.4%	-1.8%	2.1%
FMCG	19187	-1.1%	-1.7%	-4.2%	-7.6%
Health Care	43678	-1.0%	-0.9%	-0.9%	-0.1%
IT	36795	0.0%	-0.9%	-0.6%	-16.6%
METAL	36609	-0.3%	-2.8%	4.9%	32.2%
Oil & Gas	27264	0.5%	-5.7%	-2.5%	5.0%
Power	6359	-1.8%	-5.5%	-2.4%	-1.0%
Realty	6807	-2.2%	-2.3%	-1.1%	-10.3%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	115450	0%	1%	3%	7%
Fresh Exposure	4527	8%	25%	87%	19%
Exposure liquidated	3794	2%	27%	23%	-3%
Closing Net scripwise outstanding	116183	1%	1%	4%	8%

NSE USD Futures	09-Jan	08-Jan	Var (%)
Jan Expiry (Rs./\$)	88.24	88.24	0.0%
Feb Expiry (Rs./\$)	89.05	89.05	0.0%
Total Turnover (Rs. Crore)	1740	2113	-18%

Sectors	TTM PE
Auto	33
Auto Ancillary	42.7
Banking	14.98
Engineering	37.83
Cement	67.82
Diamonds & Jewellery	41.36
Housing Finance	23.67
Infrastructure & Const	27.8
Metals-Aluminium	26.86
Metal – Steel	18.09
Oil Expl.	11
Pharma	10.89
Power – Gen. Supp.	39.61
Information Tech.	29
Sugar	16.51
Telecom Serv. Prov.	38.22
Tyres	34.75

## India 10 year bond yield (Source: NBRR)



10 year G-Sec Yield	Current	Previous	Change
US	4.17%	4.17%	(0) bps
Japan	2.10%	2.08%	2 bps
India	6.64%	6.63%	1 bps
UK	4.37%	4.40%	(3) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	602	687	-12.4%
Inflation - WPI	-0.32%	-1.21%	89 bps
Inflation - CPI	0.71%	0.25%	46 bps

India GDP	Q3FY25	Q2FY25	Var (%)
Growth	8.23%	7.81%	42 bps

Monetary Policy	Current	Previous	Change
Repo Rate	5.25%	5.50%	(25) bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	3.00%	3.75%	(75) bps
O/S Banking System Liquidity (Rs bn)	-405	54	(459.0)

IIP Growth %	Nov-25	Nov-24	Apr-Nov
IIP	6.7	5.0	4.0
Capital Goods	10.4	8.9	5.6
Mining	8.0	5.5	4.9
Manufacturing	-1.5	4.4	-0.3
Electricity	5.4	1.9	2.5

### 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	17.83	6356287	18.04	7461606	-1.16%	1	1607.62	1614.10	-0.4%
Wipro	2.87	4841075	2.91	5453191	-1.37%	1	258.77	261.95	-1.2%
Dr.Reddy's	13.40	1343578	13.35	2024864	0.37%	1	1208.19	1210.10	-0.2%
ICICI Bank	30.66	6912178	31.32	10139974	-2.11%	2	1382.21	1404.30	-1.6%
HDFC Bank	33.10	5371160	33.39	15963346	-0.87%	3	994.81	939.00	5.9%

### GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	44.50	44.55	(0.0)	-0.1%
RIL	65.70	65.10	0.6	0.9%
SBI	111.60	111.00	0.6	0.5%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.70%	3.00%
Unemployment (%)	4.40%	4.50%

Interest Rate (%)	Current	Previous
Fed Rate	3.75%	4.00%

US GDP	Q2CY25	Q1CY25
Growth (QoQ Annualized)	4.30%	3.80%

China Economy Data	Current	Previous
GDP	4.80%	5.20%
Inflation – CPI (%)	0.80%	0.70%

### Economic Calendar

	Date
Indian GDP Data	27 Feb
Indian Inflation Data CPI	12 Jan
Indian Inflation Data WPI	14 Jan
Indian Monetary Policy	27 Feb
India's Industrial Production (IIP)	28 Jan
US Inflation Data	13 Jan
US GDP	22 Jan
US Unemployment Data	06 Feb
US Fed Rate	29 Jan
China GDP	19 Jan
China Inflation Data	11 Feb

### Event Update

Name	Date	Purpose
SKM Egg Products Export (India) Ltd.	12-01-26	Stock Split from Rs.10/- to Rs. 5/-
Authum Investment & Infrastructure Ltd.	13-01-26	Bonus issue
Kotak Mahindra Bank Ltd.	14-01-26	Stock Split from Rs.5/- to Re.1/-
Ajmera Realty & Infra India Ltd.	15-01-26	Stock Split from Rs.10/- to Rs.2/-
Best Agrolife Ltd.	16-01-26	Bonus issue
Jaro Institute of Technology Management and Research Ltd.	16-01-26	Interim Dividend



## Bulk Deal As On 09/01/26

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
544669	ADMACH	MYRAA VARUN RAHEJA	B	102000	225.65
540545	BGJL	KERARAM CHOUDHARY	B	103233	43.61
540681	CHOTHANI	SOMANI STOCK BROKING PVT LTD	S	100000	15.81
539559	DDIL	NIMIT JAYENDRA SHAH	S	1000000	5.61
521137	EUREKAI	WHITEWORK VENTURES LLP	S	68731	7.62
544665	GLOBALLOG	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	S	88000	120
544665	GLOBALLOG	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRIVATE LIMITED	B	99200	119.92
539222	GROWINGTON	PROGNOSIS SECURITIES PVT. LTD.	S	4305189	0.64
513361	INDIAHOMES	F3 ADVISORS PRIVATE LIMITED	B	4300000	12.73
513361	INDIAHOMES	M K BANKA (HUF)	S	3429101	13
513361	INDIAHOMES	PAVAPURI EXPORTS PRIVATE LIMITED	S	4300000	12.73
539997	KPL	ARK GLOBAL EMERGING COMPANIES, LP	B	76400	1130.04
539997	KPL	DEEPAK BANSAL	S	69353	1122.42
544641	KVTOYS	129 WEALTH FUND	B	31800	316.77
544635	LUXURY	VINEY GROWTH FUND	S	57600	84.55
532637	MANGALAM	EPITOME TRADING AND INVESTMENTS	S	134064	38.77
532637	MANGALAM	SANJAY KUMAR SAINI	B	95000	38.77
544673	MDRC	SRINIVASA VARA PRASAD YAGNAMURTHY CHENCHU (PIS)	B	91200	94.9
544673	MDRC	YASHASVI WEALTH MANAGEMENT LLP	S	97600	94.46
544663	NEPLOG	BALANCE TRADERS	S	100000	61.46
544663	NEPLOG	BONANZA PORTFOLIO LIMITED	S	53000	61.17
544663	NEPLOG	BONANZA PORTFOLIO LIMITED	B	73000	61.46
509040	NETLINK	DAIZY WEALTHEDGE ADVISORS	B	17298	175.54
543540	PGCRL	JHANVI SINGH VIJAY SINGH JHALA	S	24600	123.77
543540	PGCRL	KARAMVIRSINGH HEMANTSINGH JHALA	S	24000	123.75
543540	PGCRL	KRISHNA TRADE FINANCE	S	10800	124.44
543540	PGCRL	KRISHNA TRADE FINANCE	B	43200	123.85
543540	PGCRL	NANVI HEMANTSINGH JHALA	S	24000	123.75
512591	PULSRIN	BASHEER KAMBAYIL IBRAHIM	S	385390	2.34
512591	PULSRIN	TATAD NAYAN GAUTAMBHAI	S	411869	2.34
530053	REALECO	MOHATTA COMPUTERS PRIVATE LIMITED	S	797042	4.97
540259	SHANGAR	ANSHU KAPOOR	B	2999997	0.29
538212	SHARPINV	MANI MARKETING & HOLDINGS PRIVATE LIMITED	S	1530365	0.3
542046	VIVIDM	SALIM MOHAMMED HUSSEIN PUNJANI	S	800000	6.2
544636	WOSAL	IMRAN KHAN	S	38000	20.54

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
3IINFOLD	3i Infotech Limited	SIVANANDA BALAJI PENJURI	SELL	1045963	15.55
EPWINDIA	EPW India Limited	TIGER STRATEGIES FUND -I	SELL	87600	117.11
KALANA	Kalana Ispat Limited	PROGNOSIS SECURITIES PVT. LTD	SELL	76000	20.27
KRYSTAL	Krystal Integrated Ser L	AEGIS INVESTMENT FUND	SELL	86611	622.89
MACOBSTECH	Macobs Technologies Ltd	ENS ENTERPRISES LIMITED	BUY	233600	208.78
MACOBSTECH	Macobs Technologies Ltd	RAMAN TALWAR	SELL	233600	208.78
MCL	Madhav Copper Limited	NEO APEX VENTURE LLP	BUY	450000	67.5
MRIL	Mahendra Realto & Infra L	NEOMILE GROWTH FUND-SERIES I	BUY	118400	62.48
MANAKALUCO	Manak Aluminium Co. Ltd.	RAGHAV GUPTA	BUY	343120	36.48
MODIS	Modis Navnirman Ltd	F3 ADVISORS PRIVATE LIMITED	BUY	328400	329.5
MODIS	Modis Navnirman Ltd	SETU SECURITIES PRIVATE LIMITED	SELL	328400	329.5
MTARTECH	MTAR Technologies Limited	BOFA SECURITIES EUROPE SA	BUY	206076	2665.45
SANGANI	Sangani Hospitals Limited	ASHUTOSH JAYANTILAL JUTHANI	SELL	69000	48.75
SIGACHI	Sigachi Industries Ltd	KETAN HASMUKHLAL DOSHI	BUY	5683619	29.91
TATACAP	Tata Capital Limited	MARSHALL WACE INVESTMENT STRATEGIES - EUREKA FUND	SELL	1153013	354.5
TATACAP	Tata Capital Limited	MARSHALL WACE INVESTMENT STRATEGIES-TOPS WORLD EQUITIES	SELL	280638	354.5
TATACAP	Tata Capital Limited	SOCIETE GENERALE	BUY	1433651	354.5
TIMESCAN	Timescan Logistics Ind L	MANISH CHANDRAPRAKASH RUIA	SELL	78000	45.36
TIMESCAN	Timescan Logistics Ind L	RISHIKESH RAJ SINGH	BUY	66000	45.35
VINEET-RE	Vineet Laboratories Ltd	CHINTHAKUNTA SULOCHANA	SELL	82012	1.02

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