

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44402	44643	(241)	-0.5%
Dow Futures	44445	44479	(34)	-0.1%
Nasdaq	19737	19860	(123)	-0.6%
FTSE	8352	8309	43	0.5%
Nikkei	39197	39161	37	0.1%
Hang Seng	20625	20414	211	1.0%
Gift Nifty	24713	24724	(12)	0.0%
Straits Singapore	3813	3795	18	0.5%
South Korea	2417	2361	56	2.4%
Taiwan	23142	23273	(132)	-0.6%
Shanghai	3462	3403	60	1.8%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9232	9123	110	1.2%
Alumin (\$/MT)	2588	2604	(16)	-0.6%
Zinc (\$/MT)	3126	3072	55	1.8%
Brent Crude (\$/bbl)	72	72	(0)	-0.3%
Gold (\$/Ounce)	2671	2660	11	0.4%
Silver (\$/Ounce)	32	32	0	0.5%
Light Crude (\$/bbl)	68	68	(0)	-0.3%
N G (\$/mmbtu)	3	3	(0)	-0.4%
Sugar (\$/MT)	555	561	(6)	-1.1%
Rubber (Rs./kg)	190	195	(5)	-2.6%
Baltic Dry Index	1168	1167	1	0.1%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	84.73	84.70	0.04%
Rs./ Euro	89.54	89.59	-0.06%
Rs./Chinese Yuan	11.69	11.67	0.15%
Yen /\$ rate	151.08	151.21	-0.09%
\$ US/Euro	1.06	1.06	0.03%

Dollar Index	Current	Previous	Var(%)
Dollar Index	106.14	106.15	-0.01%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24540	53270
Support 2	24470	53000
Resistance	24670	53740

Securities in Ban For Trade	
GRANULES	MANAPPURAM
PVRINOX	RBLBANK

### Market Review

**US:** Wall Street's main indexes closed lower on Monday, driven by a drop in AI leader Nvidia that weighed on tech stocks, as investors looked ahead to a crucial inflation report set for later this week.

**Asia:** Asia-Pacific markets were mostly higher Tuesday, following losses on Wall Street that saw the S&P 500 and Nasdaq Composite pull back from record highs ahead of key inflation data.

**India:** The benchmark equity indices ended the week's first trading session on a lower note on Monday amid weak global cues. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

**Global economy:** China has pledged to implement more proactive fiscal stimulus measures and adopt moderately looser monetary policies in 2025. The readout flagged achievements in strengthening economic resilience, advancing technological innovation, deepening reforms, and safeguarding people's livelihoods. These efforts have contributed to maintaining stability and reinforcing China's economic and comprehensive national strength.

European nations are currently grappling with their most significant economic challenges post-pandemic. Inflation and the cost of living crises, which rose sharply since early 2022, have become especially pressing issues, creating ripples of discontent and leading many to question the stability of existing political structures.

**Commodities:** Oil prices eased only slightly on Tuesday, holding on to most of their gains from the prior session as mounting geopolitical risk after the fall of Syrian President Bashar al-Assad and China's vow to ramp up policy stimulus kept a floor under prices.

Gold prices remained mostly unchanged on Tuesday, staying near a two-week high hit in the previous session, as investors awaited key U.S. inflation data, due later this week, for further insights into the Federal Reserve's interest rate outlook.

**Currency:** The U.S. dollar edged to the highest level this month against the yen on Tuesday as traders looked ahead to a reading of U.S. inflation due the following day for further clues on the path of Federal Reserve policy.

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	29648	2058	27901	1843	215	363444	24295	366021	24605	(2577)	(310)
Index Option	14377792	929986	14479737	933087	(3101)	7462463	489052	6163516	409694	1298947	79358
Stock Future	241735	16414	354261	23354	(6940)	4962753	336121	4962263	337472	490	(1351)
Stock Option	910164	62994	978935	67327	(4333)	1039419	69227	940774	63048	98645	6179
<b>Total</b>	<b>15559339</b>	<b>1011452</b>	<b>15840834</b>	<b>1025611</b>	<b>(14159)</b>	<b>13828079</b>	<b>918695</b>	<b>12432574</b>	<b>834819</b>	<b>1395505</b>	<b>83876</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
2-Dec-24	16809	13016	3793
3-Dec-24	26782	17485	9298
4-Dec-24	20801	17937	2864
5-Dec-24	25335	15846	9489
6-Dec-24	13439	14226	(786)
<b>Month to date- Dec</b>	<b>103167</b>	<b>78509</b>	<b>24657</b>

FII (Prov.) (Rs Cr)	Buy	Sell	Net
3-Dec-24	22450	18785	3665
4-Dec-24	19969	18171	1798
5-Dec-24	24717	16177	8540
6-Dec-24	12014	13844	(1830)
9-Dec-24	16650	15926	724
<b>Month to date-Dec</b>	<b>109405</b>	<b>96747</b>	<b>12658</b>

DII (Prov.) (Rs. Cr)	Buy	Sell	Net
3-Dec-24	14553	14804	(251)
4-Dec-24	14082	14983	(901)
5-Dec-24	13396	15699	(2304)
6-Dec-24	11651	9992	1659
9-Dec-24	10430	12078	(1648)
<b>Month to date-Dec</b>	<b>77717</b>	<b>81400</b>	<b>(3683)</b>

FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
2-Dec-24	5486	1774	3712
3-Dec-24	5927	3922	2005
4-Dec-24	4268	3853	415
5-Dec-24	4045	1832	2213
6-Dec-24	6437	2003	4434
<b>Month to date- Dec</b>	<b>26164</b>	<b>13384</b>	<b>12780</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2257	53%	1496	52%
Decline	1822	43%	1324	46%
Unchanged	161	4%	67	2%

Market Turnover	09-Dec	06-Dec	Var (%)
BSE Cash	6946	6745	3%
NSE Cash	106674	108779	-2%
NSE Futures	101349	124198	-18%
NSE Options	10179312	8205314	24%
Total (Rs.Cr)	10394280	8445036	23%

Volatility Index	09-Dec	06-Dec
Volatility Index	14.11	14.14

Index PE - TTM	09-Dec	Yr. High	Yr. Low
Sensex	23.3	26.0	21.8
Nifty	22.7	28.8	20.8

Corporate News

**JSW Steel Production Rises 5% to 23.23 Lakh Tn in November**

JSW Steel Ltd.'s consolidated crude steel production increased 5% YoY in Nov. The company produced 23.23 lakh tn in the month of Nov, compared to 22.04 lakh tn in the same period a year ago. (NDTV)

**Vodafone Idea to Raise Rs 1,980 Cr From UK Parent Via Share Sale**

Vodafone Idea Ltd. will raise up to Rs 1,980 cr via share sale on a preferential basis to entities within the UK parent Vodafone Group Plc. The board on Mon gave its nod to sell 175 cr shares to Omega Telecom Holdings Pvt. and Usha Martin Telematics Ltd. (NDTV)

**Bharat Electronics Bags Rs 634-Cr Orders Related To EVMs, Missile System, Jammers**

Bharat Electronics Ltd. has secured new orders worth Rs 634 cr, bolstering its order book for the current fiscal. Among the major orders are contracts for the maintenance of the Akash Missile System, telescopic sights for guns, communication equipment, jammers, and electronic voting machines. (NDTV)

Economy

**Revenue Secretary Sanjay Malhotra to be RBI Governor**

The government appointed IAS Officer Sanjay Malhotra as the next governor of the RBI for a three-year term, succeeding Shaktikanta Das, whose tenure ends Tuesday. Malhotra takes over at a time of high inflation and slowing growth amid calls for rate cuts to bolster the economy. (ET)

**Online orders, sustainable goods drove exports in 2024**

Higher online orders, demand for sustainable products and order values that were lower than the past were among the key trends for Indian exporters in the year that is coming to a close. Exporters termed 2024 as a mixed year amid US elections and slow demand in some European countries, especially France and Germany, even as they expect the start of the holiday season in the Western markets to boost shipments.(ET)

International

**Google pulls McDonald's negative reviews over arrest in UnitedHealth murder**

Google removed derogatory reviews about McDonald's after the suspect in the killing of UnitedHealth executive Brian Thompson was arrested at its restaurant in Altoona, Pennsylvania, where police say a customer alerted a local employee about him. In this case, the negative and one-star reviews showed up after Luigi Mangione, 26, was captured at a McDonald's in Altoona. (Inv)

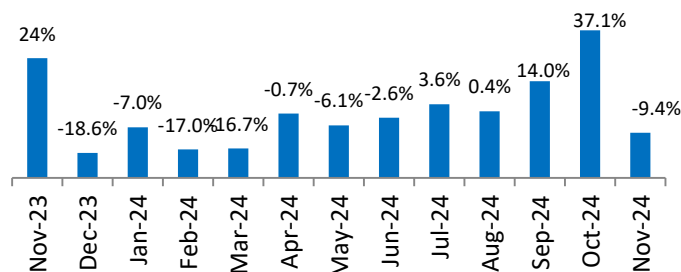
Top 5 Nifty Gainers	09-Dec	06-Dec	Var(%)
WIPRO	304	297	2.2%
LT	3947	3867	2.1%
SBILIFE	1469	1449	1.4%
TATASTEEL	150	148	1.1%
BPCL	303	300	1.0%
Top 5 Nifty Losers	09-Dec	06-Dec	Var(%)
TATACONSUM	934	974	-4.2%
HINDUNILVR	2401	2484	-3.3%
TATAMOTORS	799	817	-2.2%
AXISBANK	1163	1185	-1.8%
NESTLEIND	2229	2268	-1.7%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	81508	-0.2%	1.6%	2.5%	16.7%
MIDCAP	47822	0.3%	2.7%	3.8%	35.5%
SMLCAP	57314	0.5%	3.0%	4.4%	39.4%
AUTO	53817	-0.6%	0.9%	-0.4%	32.9%
BANKEK	60827	-0.3%	2.6%	3.3%	13.9%
Capital Goods	73602	1.1%	3.7%	5.9%	38.3%
FMCG	20762	-1.9%	-2.1%	-3.0%	7.1%
Health Care	44347	-0.4%	0.3%	0.7%	46.2%
IT	44670	0.3%	3.4%	6.4%	31.4%
METAL	31845	0.5%	3.0%	2.8%	28.7%
Oil & Gas	27236	-0.3%	1.4%	-0.3%	22.5%
Power	7654	0.3%	1.9%	-0.6%	35.4%
Realty	8407	0.2%	2.4%	11.3%	43.6%

NSE USD Futures	09-Dec	06-Dec	Var (%)
Dec Expiry (Rs./\$)	83.94	83.88	0.1%
Jan Expiry (Rs./\$)	84.25	83.94	0.4%
Total Turnover (Rs. Crore)	1457	2709	-46%

Sectors	TTM PE
Auto	30.47
Auto Ancillary	50.91
Banking	14.78
Engineering	49.07
Cement	87.28
Diamonds & Jewellery	58.71
Housing Finance	26.39
Infrastructure & Const	35.8
Metals-Aluminium	39.66
Metal – Steel	16.98
Oil Expl.	15.19
Pharma	9.64
Power – Gen. Supp.	43.53
Information Tech.	29.49
Sugar	25.25
Telecom Serv. Prov.	70.48
Tyres	29.6

**Escorts Monthly Volume Growth (YoY)**  
(Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.19%	4.20%	(1) bps
Japan	1.08%	1.05%	2 bps
India	6.72%	6.75%	(3) bps
UK	4.27%	4.28%	(1) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	658	658	0.0%
Inflation - WPI	2.36%	1.84%	52 bps
Inflation - CPI	6.21%	5.49%	72 bps

India GDP	Q2FY25	Q1FY25	Var(%)
Growth	5.40%	6.70%	(130)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)	403	403	0.4

IIP Growth %	Sep-24	Sep-23	Apr-Feb
IIP	3.1	6.4	4.4
Capital Goods	0.7	13.1	3.6
Mining	1.0	10.0	4.1
Manufacturing	-3.7	15.3	6.6
Electricity	-4.3	12.3	5.1



**Bulk Deal As On 09/12/24**

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
543499	ACHYUT	FLYONTRIP SERVICES PRIVATE LIMITED	S	148500	80.02
521048	ADVLIFE	PRERNA PRADEEP AGARWAL	S	37513	37.66
531252	ANERI	NARENDRA BABU KADATHUR HARIDAS	S	19489	8.08
531252	ANERI	RUCHIRA GOYAL	B	35000	8.05
530249	BRIDGESE	SHAH JYOTSANABEN RAJNIKANT	S	171528	8
512169	CAPRICORN	DEEPA ITHA	S	20098	16.5
512169	CAPRICORN	SANDEEP CHANDRA VELLORE	B	20500	16.5
530427	CHOKSI	CRONY VYAPAR PVT LTD	S	1683	109.75
530427	CHOKSI	CRONY VYAPAR PVT LTD	B	22464	111.85
539884	DARSHANORNA	BHATIA NIKHIL MURLIDHAR	S	311185	4.87
539884	DARSHANORNA	BHATIA NIKHIL MURLIDHAR	B	19422	4.78
543516	DHYAANITR	SHASHIN GAUTAMBHAI SHAH	B	98000	14.65
539032	FRASER	LOREM INVESTMENT	S	129365	7.49
539041	GANVERSE	HEMA GOVINDARAJAN	S	125000	46.5
539486	GEETANJ	BHARAT HEMRAJ GAJRA	S	22179	4.91
540614	GGENG	ONE TREE HILL PROPERTIES PRIVATE LIMITED	S	13348406	1.82
519574	HINDUST	RAJENDRA NANIWADKAR	S	100000	52.88
539449	IGCIL	ADITYA AGGARWAL	B	220000	14
539449	IGCIL	ALPABEN GAUTAMBHAI PARMAR	S	384600	14.5
539449	IGCIL	GAUTAMBHAI DIPAKBHAI PARMAR	S	361704	14.49
539449	IGCIL	GIRIJADHAVA VYAPAAR PRIVATE LIMITED	B	650000	14
539449	IGCIL	HIRISE INFRACON LIMITED	B	600000	14
539449	IGCIL	ISHAAN TRADEFIN LLP	S	200000	14.47
539449	IGCIL	JENIVA ANTONY EPHREM	B	732695	14.48
539449	IGCIL	JIVAIB TRADING PRIVATE LIMITED	B	1500000	14.34
539449	IGCIL	NEELAM MITTAL	S	345000	14
539449	IGCIL	PROGNOSIS SECURITIES PVT. LTD.	B	625000	14
539449	IGCIL	SETU SECURITIES PVT. LTD.	S	105000	14
539449	IGCIL	SETU SECURITIES PVT. LTD.	B	180000	14.01
539449	IGCIL	STATSOL RESEARCH LLP	S	192307	14
539449	IGCIL	SURA TRADE LINKS PRIVATE LIMITED	S	300000	14
539449	IGCIL	TOPGAIN FINANCE PRIVATE LIMITED	S	195400	14.11
539449	IGCIL	VARDIP GLOBSTRAT TRADING PRIVATE LIMITED	B	3500000	14.14
539449	IGCIL	VIJAY BABUBHAI PARMAR	S	368000	14.49
539449	IGCIL	VIKI DIPAKBHAI PARMAR	S	377000	14.49
539449	IGCIL	VIPULBHAI CHATURBHAI CHAUHAN	S	384600	14.49
539449	IGCIL	WESSEL CONSULTANCY PRIVATE LIMITED	B	605000	14
531968	IITLPROJ	SYSTEMATIX FINCORP INDIA LIMITED	S	47659	64.31
511092	JMDVL	MANISH KUMAR HUF	S	146012	17.01
511092	JMDVL	SAROJBEN INDRAVADAN MODI	B	468000	17.1
511092	JMDVL	SPECIFIC COMMODITIES PRIVATE LIMITED	S	172183	17.1
511092	JMDVL	SPECIFIC COMMODITIES PRIVATE LIMITED	B	172183	16.96
543289	KGES	MICRO SPARK VENTURES LLP	B	12000	30.37
512415	MERCTRD	MULTITUDE GROWTH FUNDS LIMITED	S	52133	91.48
512415	MERCTRD	NEXPACT LIMITED	S	33380	91.48
512415	MERCTRD	PHOGAT	B	20000	91.48
526345	PANJON	JUPITER CITY DEVELOPERS (INDIA) LIMITED	B	423720	27.34
526345	PANJON	KAUSHIK SHAH SHARES & SEC. LTD	S	441589	27.39
523862	PIFL	AYISHA NAINER RAWTHAR	S	53800	21.02

523862	PIFL	RUCHIRA GOYAL	B	28800	21.02
530095	PRADHIN	DHRUV GANJI	B	201449	29.86
530095	PRADHIN	JAISUKHLAL REVASHANKER VORA	S	38400	29.94
530095	PRADHIN	LAXMANBHAI RAVJIBHAI GAJERA	S	48928	29.54
530095	PRADHIN	NIKHIL CHANDRA	S	80599	29.94
538452	QUASAR	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	S	270213	3.95
538452	QUASAR	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	B	250000	3.95
541601	RAJNISH	AZMAT TRADERS LLP	S	4329000	1.79
541601	RAJNISH	JOYDEEP COMMOSALES LLP	S	8421451	1.79
541601	RAJNISH	NACIO MULTI TRADERS LLP	S	5130000	1.79
541601	RAJNISH	SARVAGAY TEXTILE LLP	S	13700000	1.79
539673	RCL	GOPAL KRISHAN RUNGTA	B	140000	3.47
539673	RCL	MADHU RUNGTA	B	145000	3.47
539673	RCL	MONEYPLANT GOLD & JEWELLERY TRADING L.L.C	S	450000	3.49
539673	RCL	PHANI KUMARI KOLLIPARA	B	174000	3.49
539673	RCL	PREETI BHAUKA	S	312715	3.5
539673	RCL	SHARVAN KUMAR JAIN	S	101448	3.47
543256	RFLL	KIRAN MITTAL	S	80400	20.99
512115	ROSEMER	KAJAL ROHIRA	S	35277	109.38
512115	ROSEMER	SUDHIR VAMAN PADYAR	B	22700	108.9
531893	SAWABUSI	SHARE INDIA SECURITIES LIMITED	S	6800018	0.76
531893	SAWABUSI	SHARE INDIA SECURITIES LIMITED	B	6800018	0.76
526081	SCAGRO	JIVAIB TRADING PRIVATE LIMITED	B	269550	15
526081	SCAGRO	SHEELA CHANDAK	S	300000	15.02
540961	SHIVAMILLS	SILVER LINE VENTURES PRIVATE LIMITED	B	50000	115.7
512359	SWORDEDGE	RAVINDER KUMAR GUPTA	S	1884128	0.32
539310	THINKINK	MAHADEV MANUBHAI MAKAWANA	S	21232359	1.94
539310	THINKINK	MAHADEV MANUBHAI MAKAWANA	B	972059	1.93
539310	THINKINK	MAHAMMADFARUK HAJIBHAI MIR	S	28722066	1.94
539310	THINKINK	PURE BROKING PRIVATE LIMITED	B	3637983	1.94
539985	TITAANIUM	JAIRAJ LAXMINARAYAN TEKWANI	S	48000	107.69
539985	TITAANIUM	JATINKUMAR PRAVINBHAI PATEL	S	36000	107.69
539985	TITAANIUM	KARUN MODI	S	40000	107.69
539985	TITAANIUM	NITIKA MODI	S	44000	107.69
539985	TITAANIUM	SAKSHI MODI	S	52000	107.69
539985	TITAANIUM	SHARDA MODI	S	52000	107.69
521005	TITANIN	CTIL MEDIA PRIVATE LIMITED	B	169278	45.32
540726	TTFL	MAHABIR PRASAD AGARWALA	B	76000	130.55
539097	URSUGAR	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	S	32347	11.1
539097	URSUGAR	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	B	536892	11.03
544002	VIVAA	JAIKISHAN LALCHAND SAJNANI	S	20000	41.63
544002	VIVAA	KALGI KUNJAN VORA	B	26000	41.68
530057	VIVANZA	PARTH HEMANT PARIKH	S	438796	3.34
506122	VOLKAI	GLADIS MENEZES	B	2100	212.45
543436	WITS	MANOJ KUMAR KANDA	B	2400	219.35
543436	WITS	NARENDRASINH MANUBHA ZALA	S	3200	219.35
514378	YARNSYN	ALPESHBHAI RASKLAL SHAH	B	19800	30.83
514378	YARNSYN	KHETAWAT WEALTH MANAGEMENT PRIVATE LIMITED	B	100000	30.97
514378	YARNSYN	MAKWANA DIXIT CHANDUBHAI	S	70000	31
514378	YARNSYN	MAKWANA DIXIT CHANDUBHAI	B	52810	30.67
514378	YARNSYN	SACHINKUMAR ARJANBHAI SOJITRA	S	20000	30.9

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ASLIND	ASL Industries Limited	YUVRAJ HIRALAL MALHOTRA	SELL	88000	31.53
CGRAPHICS	Creative Graphics S Ind L	ACINTYO INVESTMENT FUND PCC- CELL 1	SELL	125600	194.32
CGRAPHICS	Creative Graphics S Ind L	CAPRI GLOBAL HOLDINGS PRIVATE LIMITED	BUY	400000	199.91
GANESHIN	Ganesh Infraworld Limited	STATSOL RESEARCH LLP	SELL	304000	157.3
GREAVESCOT	Greaves Limited	KEDIA SECURITIES PRIVATE LTD	BUY	1200000	208.87
INDIANCARD	Indian Card Clothing Co.	ASHOK JAIN	BUY	30000	316.66
ORTINGLOBE	ORTIN GLOBAL LIMITED	NITIN AGRAWAL	SELL	47011	19.12
PRIMESECU	Prime Securities Limited	ADITYA KUMAR HALWASIYA	BUY	175000	288.71
ARENTERP	Rajdharshan Inds Ltd	ADROIT FINANCIAL SERVICES PVT LTD	BUY	20022	81.99
ARENTERP	Rajdharshan Inds Ltd	ADROIT FINANCIAL SERVICES PVT LTD	SELL	20022	82.32
ARENTERP	Rajdharshan Inds Ltd	MANISH GOYAL HUF	SELL	17605	81.99
RAJPUTANA	Rajputana Biodiesel Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	45000	285.15
TERASOFT	Tera Software Limited	GHALLA BHANSALI STOCK BROKERS PRIVATE LIMITED	BUY	64210	181.94
TERASOFT	Tera Software Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	75000	181.94
TRANSTEEL	Transteel Seating Tech L	KARAN ATUL BORA	SELL	224000	74.43
TRANSTEEL	Transteel Seating Tech L	MONIKA GUPTA	BUY	162000	74.93
TRANSTEEL	Transteel Seating Tech L	UPASNA GOYAL	BUY	126000	74.91
UPL-RE	UPL Limited	VANGUARD EMERGING MARKETS STOCK INDEX FUND A SERIES OF VIEIF	SELL	723378	176.79
UPL-RE	UPL Limited	VANGUARD TOTAL INTERNATIONAL STOCK INDEX FUND	SELL	791084	176.79

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