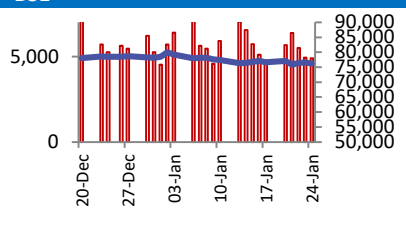
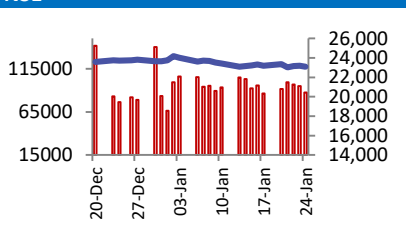


BSE		NSE																													
	<table border="1"> <tr><td>Open</td><td>76455</td></tr> <tr><td>High</td><td>76986</td></tr> <tr><td>Low</td><td>76092</td></tr> <tr><td>Close</td><td>76190</td></tr> <tr><td>Change</td><td>-330</td></tr> <tr><td>Volume (Lacs)</td><td>4027</td></tr> <tr><td>Turnover (Rs.inCr)</td><td>4907</td></tr> </table>	Open	76455	High	76986	Low	76092	Close	76190	Change	-330	Volume (Lacs)	4027	Turnover (Rs.inCr)	4907		<table border="1"> <tr><td>Open</td><td>23184</td></tr> <tr><td>High</td><td>23347</td></tr> <tr><td>Low</td><td>23050</td></tr> <tr><td>Close</td><td>23092</td></tr> <tr><td>Change</td><td>-113</td></tr> <tr><td>Volume(Lacs)</td><td>25154</td></tr> <tr><td>Turnover(Rs.in Cr)</td><td>87531</td></tr> </table>	Open	23184	High	23347	Low	23050	Close	23092	Change	-113	Volume(Lacs)	25154	Turnover(Rs.in Cr)	87531
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World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44424	44565	(141)	-0.3%
Dow Futures	44412	44602	(190)	-0.4%
Nasdaq	19954	20054	(99)	-0.5%
FTSE	8502	8565	(63)	-0.7%
Nikkei	39700	39932	(232)	-0.6%
Hang Seng	20184	20066	117	0.6%
Gift Nifty	22942	23073	(131)	-0.6%
Straits Singapore	3793	3804	(11)	-0.3%
South Korea	2537	2515	21	0.8%
Taiwan	23525	23525	Closed	Closed
Shanghai	3262	3253	9	0.3%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9276	9232	44	0.5%
Alumin (\$/MT)	2641	2624	18	0.7%
Zinc (\$/MT)	2828	2847	(19)	-0.7%
Brent Crude (\$/bbl)	78	79	(1)	-0.9%
Gold (\$/Ounce)	2756	2771	(15)	-0.5%
Silver (\$/Ounce)	30	31	(0)	-1.2%
Light Crude (\$/bbl)	74	75	(1)	-1.0%
N G (\$/mmbtu)	4	4	(0)	-5.7%
Sugar (\$/MT)	498	487	11	2.3%
Rubber (Rs./kg)	191	191	(0)	-0.2%
Baltic Dry Index	778	824	(46)	-5.6%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	86.21	86.47	-0.30%
Rs./ Euro	90.47	90.03	0.49%
Rs./Chinese Yuan	11.91	11.87	0.34%
Yen /\$ rate	155.64	156.00	-0.23%
\$ US/Euro	1.05	1.05	-0.30%

Dollar Index	Current	Previous	Var(%)
Dollar Index	107.70	107.44	0.24%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22940	48000
Support 2	22870	47740
Resistance	23170	48540

Securities in Ban For Trade	
ABFRL	PNB
BANDHANBNK	LTF
CANFINHOME	MANAPPURAM
DIXON	MGL
INDIAMART	

Market Review

US: On Friday, after posting the best rally, US share indices took a breather as chipmakers' stocks weighed.

Asia: Most Asia-Pacific markets were trading higher in early trade Monday tracking Wall Street move from Friday. Market participants focused on US President Donald Trump's policies.

India: Market extended their losses for the third consecutive week as earnings woes continue to hurt investor sentiments. **Market is expected to open on a gap down note and likely to witness sideways move during the day.**

Global economy: China's Jan non-manufacturing activity grew but at a slower pace than in Dec, suggesting policymakers need to introduce even more stimulus measures to prop up depressed domestic demand. The official non-manufacturing purchasing managers' index, which includes services and construction, fell to 50.2 from 52.2 in Dec. The 50-point mark separates expansion from contraction in activity on a monthly basis. The NBS composite PMI, which includes manufacturing and services, came in at 50.1 in January, versus 52.2 in Dec.

The US housing market showed signs of modest growth as the Existing Home Sales figures were released. The actual number of sales for the previous month came in at an annualized rate of 4.24 mn. This figure surpassed the forecasted number of 4.19 mn homes, indicating a more robust housing market than analysts had predicted. The growth in home sales suggests a strengthening economy, which could potentially bolster the US dollar. In comparison to the previous month's figures, the actual number of existing home sales also showed an increase. The previous month's sales stood at an annualized rate of 4.15 mn homes, marking a growth of around 2.2% month-on-month.

Commodities: Oil prices fell more than 1% on Monday after Trump called on OPEC to reduce prices following the announcement of wide-ranging measures to boost U.S. oil and gas output in his first week in office.

Gold prices edged lower in early Asian hours on Monday as the dollar gained, while investors awaited more guidance on interest rate decision from the U.S. Fed's first meeting of 2025 later this week.

Currency: The dollar firmed on Monday as traders pondered the ramifications of Trump's tariff plans at the start of a week where the Fed is widely expected to hold int rates steady.

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	84909	5897	66032	5594	303	521250	40888	526101	40259	(4851)	629
Index Option	15358201	969744	15578627	982489	(12745)	6511768	468912	5625302	406452	886466	62460
Stock Future	541201	33575	536634	33386	189	5686123	345807	5670544	349243	15579	(3436)
Stock Option	1920684	123493	1922196	123161	332	1895331	115043	1859005	114548	36326	495
Total	17904995	1132709	18103489	1144630	(11921)	14614472	970650	13680952	910502	933520	60148

FII All Activity-BBG (Rs Cr)

	Buy	Sell	Net
17-Jan-25	10380	14007	(3627)
20-Jan-25	10401	14126	(3725)
21-Jan-25	10393	16721	(6328)
22-Jan-25	14400	17418	(3018)
23-Jan-25	15800	18861	(3061)
Month to date- Jan	193015	251819	(58805)

FII (Prov.) (Rs Cr)

	Buy	Sell	Net
20-Jan-25	9473	13810	(4337)
21-Jan-25	9983	15903	(5920)
22-Jan-25	12937	16963	(4026)
23-Jan-25	13317	18779	(5463)
24-Jan-25	11230	13989	(2758)
Month to date-Jan	189887	258967	(69080)

DII (Prov.) (Rs. Cr)

	Buy	Sell	Net
20-Jan-25	15339	11017	4322
21-Jan-25	14356	10855	3500
22-Jan-25	15437	11797	3640
23-Jan-25	14413	10700	3713
24-Jan-25	12835	10433	2402
Month to date-Jan	263095	196151	66945

FII Debt - BBG (Rs. Cr)

	Buy	Sell	Net
17-Jan-25	1752	957	795
20-Jan-25	975	291	683
21-Jan-25	933	776	157
22-Jan-25	3272	1621	1651
23-Jan-25	1439	933	506
Month to date- Jan	31806	34426	(2620)

Market Breadth

	BSE		NSE	
	No.	%	No.	%
Advance	955	24%	558	20%
Decline	3001	74%	2251	79%
Unchanged	103	3%	50	2%

Market Turnover

	24-Jan	23-Jan	Var (%)
BSE Cash	4907	4939	-1%
NSE Cash	87531	94927	-8%
NSE Futures	169931	144683	17%
NSE Options	11442970	35887280	-68%
Total (Rs.Cr)	11705339	36131831	-68%

Volatility Index

	24-Jan	23-Jan
Volatility Index	16.75	16.70

Index PE - TTM

	24-Jan	Yr. High	Yr. Low
Sensex	21.9	25.7	21.8
Nifty	21.1	24.4	20.8

Corporate News

Ceigall India wins contract for Ludhiana bypass; to built the 25.24 km stretch under HAM

Ceigall India has secured a bid for the development of a six-lane greenfield southern Ludhiana bypass, part of the Ludhiana-Ajmer economic corridor, worth Rs 923 cr. The project, under the hybrid annuity model in Punjab, demonstrates the company's infrastructure expertise. (NTDV)

Birla, Mitsubishi Estate ink JV to invest Rs 560 cr in new housing project

Aditya Birla Real Estate Ltd arm Birla Estates has entered into a JV with Mitsubishi Estate and will invest Rs 560 cr to develop a housing project in Bengaluru. (BS)

KEC International Secures Rs 1,445 Cr T&D Orders

KEC Intl has secured new orders worth Rs 1,445 cr for (T&D projects in India. The contracts include the construction of ± 800 kV HVDC and 400 kV transmission lines, awarded by Power Grid. (BW)

Economy

India's exports to US up 5.57% to \$60 bn in April-December FY25

India's exports increased by 5.57% to USD 59.93 bn during April-December due to strong demand in the US market, while imports grew by 1.91% in the same period. Experts predict continued growth in bilateral trade and potential opportunities due to the US-China trade conflict. (ET)

Staffing firms call for cutting GST rate to 5%

Staffing firms in India are advocating for a reduction in the GST on employment services from 18% to 5%, citing their low profit margins and the need to promote organized employment. The Indian Staffing Federation has also requested industry status for the sector to facilitate better growth and implementation of staffing solutions. (ET)

International

JLR to invest \$80 mn to meet demand for custom luxury car colours

Jaguar Land Rover will invest 65 mn pounds (\$80.71 mn) to expand its luxury paint services in the UK and Slovakia to meet increased demand for personalised cars from high-end clients. The luxury car maker joins rival Rolls-Royce, Motor Cars, a unit of BMW, in trying to cash in on the trend. (Inv)

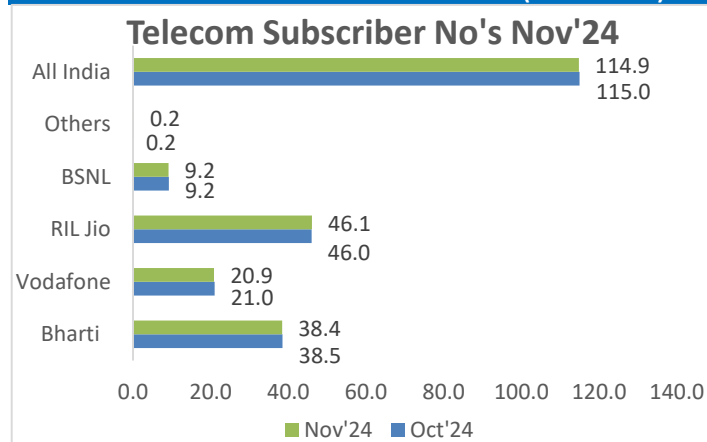
Top 5 Nifty Gainers	24-Jan	23-Jan	Var(%)
HINDUNILVR	2368	2322	2.0%
BRITANNIA	5102	5013	1.8%
EICHERMOT	5206	5116	1.8%
GRASIM	2491	2461	1.2%
TATACONSUM	992	984	0.9%
Top 5 Nifty Losers	24-Jan	23-Jan	Var(%)
DRREDDY	1224	1289	-5.0%
TRENT	5490	5734	-4.2%
M&M	2801	2886	-2.9%
ADANIENT	2315	2385	-2.9%
BPCL	264	271	-2.7%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	76190	-0.4%	-0.6%	-3.2%	7.8%
MIDCAP	42716	-1.6%	-2.4%	-7.8%	13.2%
SMLCAP	50108	-2.2%	-4.2%	-9.0%	12.9%
AUTO	49967	-1.7%	-3.0%	-4.3%	17.2%
BANKEKX	54723	-0.4%	-0.4%	-6.0%	7.8%
Capital Goods	62231	-1.9%	-4.5%	-8.7%	9.4%
FMCG	20367	0.3%	0.2%	-1.3%	2.2%
Health Care	42199	-2.2%	-1.1%	-5.5%	28.0%
IT	42714	-0.1%	2.3%	-2.1%	14.8%
METAL	28505	-0.6%	-0.7%	-2.4%	9.2%
Oil & Gas	25182	-2.3%	-3.5%	-2.6%	2.1%
Power	6461	-0.8%	-3.5%	-7.5%	5.4%
Realty	6717	-2.5%	-9.2%	-19.6%	3.2%

NSE USD Futures	24-Jan	23-Jan	Var (%)
Jan Expiry (Rs./\$)	86.58	86.58	0.0%
Feb Expiry (Rs./\$)	86.27	86.47	-0.2%
Total Turnover (Rs. Crore)	8072	5059	60%

Sectors	TTM PE
Auto	28.86
Auto Ancillary	41.62
Banking	13.01
Engineering	50.74
Cement	79.91
Diamonds & Jewellery	53.32
Housing Finance	24.62
Infrastructure & Const	33.56
Metals-Aluminium	34.28
Metal – Steel	16.23
Oil Expl.	12.52
Pharma	9.35
Power – Gen. Supp.	42.02
Information Tech.	27.38
Sugar	21.84
Telecom Serv. Prov.	62.03
Tyres	25.7

Telecom Subscriber Data (Source: trai)



10 year G-Sec Yield	Current	Previous	Change
US	4.58%	4.62%	(4) bps
Japan	1.23%	1.23%	0 bps
India	6.72%	6.73%	(1) bps
UK	4.63%	4.64%	(1) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	624	624	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)	-3334	-3086	(247.6)

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	21.68	7612580	21.78	10751949	-0.46%	1	1868.92	1875.45	-0.3%
Wipro	3.77	7359908	3.74	5952181	0.80%	1	324.99	320.10	1.5%
Dr.Reddy's	14.01	1781428	14.15	1881905	-0.99%	1	1207.73	1224.40	-1.4%
ICICI Bank	27.96	4635209	27.62	4281782	1.23%	2	1205.15	1209.20	-0.3%
HDFC Bank	58.33	3271633	58.96	4283808	-1.07%	3	1676.11	1649.80	1.6%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	40.00	40.40	(0.4)	-1.0%
RIL	58.10	58.60	(0.5)	-0.9%
SBI	85.90	86.10	(0.2)	-0.2%

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	5.40%	4.60%
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	12 Feb
US GDP	30 Jan
US Unemployment Data	07 Feb
US Fed Rate	30 Jan
China GDP	16 Apr
China Inflation Data	09 Feb

Event Update

Name	Date	Purpose
KEI Industries Ltd.	27/01/25	Rs.4.00 per share(200%)Interim Dividend
Tanla Platforms Ltd.	27/01/25	Rs.6.00 per share(600%)Interim Dividend
Technopak Polymers Ltd.	27/01/25	Bonus issue
Mangalam Industrial Finance Ltd.	28/01/25	Rs.0.01 per share(1%)First Interim Dividend
Mazda Ltd.	28/01/25	Stock Split from Rs.10/- to Rs.2/-
Tips Music Ltd.	28/01/25	Rs.3.00 per share(300%)Third Interim Dividend
Wendt (India) Ltd.	28/01/25	Rs.30.00 per share(300%)Interim Dividend
Wipro Ltd.	28/01/25	Rs.6.00 per share(300%)Interim Dividend
Zensar Technologies Ltd.	28/01/25	Rs.2.00 per share(100%)Interim Dividend
Bharat Petroleum Corporation Ltd.	29/01/25	Rs.5.00 per share(50%)Interim Dividend
MPS Ltd.	29/01/25	Rs.33.00 per share(330%)First Interim Dividend
N.B.I. Industrial Finance Co. Ltd.	29/01/25	Merger
Persistent Systems Ltd.	29/01/25	Rs.20.00 per share(400%)Interim Dividend
Accelya Solutions India Ltd.	30/01/25	Rs.50.00 per share(500%)Interim Dividend
Balkrishna Industries Ltd.	30/01/25	Third Interim Dividend
Burnpur Cement Ltd.	30/01/25	Reduction of Capital
Housing & Urban Development Corporation Ltd.	30/01/25	Rs.2.05 per share(20.5%)Interim Dividend
Siemens Ltd.	30/01/25	Rs.12.00 per share(600%)Dividend
Transport Corporation Of India Ltd.	30/01/25	Second Interim Dividend
Coal India Ltd.	31/01/25	Second Interim Dividend
Emerald Finance Ltd.	31/01/25	Rs.0.06 per share(0.6%)Interim Dividend
Indian Energy Exchange Ltd.	31/01/25	Interim Dividend
JBM Auto Ltd.	31/01/25	Stock Split from Rs.2/- to Re.1/-
Kiduja India Ltd.	31/01/25	Stock Split from Rs.10/- to Re.1/-
Mohite Industries Ltd.	31/01/25	Stock Split from Rs.10/- to Re.1/-
Senco Gold Ltd.	31/01/25	Stock Split from Rs.10/- to Rs.5/-
Wealth First Portfolio Managers Ltd.	31/01/25	Dividend

Bulk Deal As On 24/01/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539562	AARNAV	CHANAKYA OPPORTUNITIES FUND I	B	250000	73.58
513513	ADITYA	SHAH DIPAK KANAYALAL	S	50000	8.99
543439	BRANDBUCKT	GUNJAN AGRAWAL	B	176000	11.27
543439	BRANDBUCKT	RAVINDRA DHONDU DHURI	S	500000	11.27
530249	BRIDGESE	NARESHKUMAR RAMANLAL PANCHAL	B	199000	9.89
542906	EASUN	PRANAY KOCHAR	B	52500	55.43
544332	FABCLEAN	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	64000	280.48
543521	FONE4	NEZONE HERBALS PVT LTD	B	210000	18.53
509024	GOLDLEG	JAYANTA ROY	S	188117	16.99
509024	GOLDLEG	RITU SINGAL	S	200000	17.55
531913	GOPAIST	ANJALIMEHRA	B	26559	7.57
544057	HAPPYFORGE	BUSINESS EXCELLENCE TRUST III	S	3910098	950.06
544057	HAPPYFORGE	SBI MUTUAL FUND	B	3591766	950
541627	HITECHWIND	VIKRAM SANWARMAL NANGALIA	B	27184	9.99
544334	INDOBELL	FINGROW INVESTMENT VENTURES PRIVATE LIMITED .	S	48000	128.82
544334	INDOBELL	JIGNESH AMRUTLAL THOBHANI	S	33000	142.3
542924	JANUSCORP	AVINASH MARUTI SUROVASE	B	150500	8.44
542924	JANUSCORP	CREATEROI FINANCIAL CONSULTANCY PRIVATE LIMITED.	S	143500	8.45
526251	MIDEASTP	MOLEM INVESTMENTS AND FINANCE PRIVATE LIMITED	S	30000	15
526251	MIDEASTP	RITESHKUMAR J SONI	B	45000	15
543579	NATURO	MINOLLOW PRIVATE LIMITED	S	104000	6.51
543305	NAVODAYENT	AVINASH MARUTI SUROVASE	B	288000	7.75
543305	NAVODAYENT	CREATEROI FINANCIAL CONSULTANCY PRIVATE LIMITED.	S	60000	7.75
543305	NAVODAYENT	ESPEON CONSULTING PRIVATE LIMITED.	S	228000	7.75
531465	NOUVEAU	TOPLINK PROJECTS PRIVATE LIMITED	S	1000000	0.49
511644	OMEGAIN	ZULIA ZAFAR	B	3920	245.35
526490	PRATIK	ATULSHANKARRAOTELWADKAR	S	483006	7.17
530525	RRETAIL	RAJMISH TRADERS LLP	S	1320000	16.23
540757	SCPL	EVOKE MANAGEMENT SERVICES LLP	B	60102	322.05
540259	SHANGAR	UMA SHANKAR EXIM PRIVATE LIMITED	B	519653	5.69
539584	SIPTL	DIVYA KANDA	S	831781	1
538923	SOFCOM	SANGUINE MANAGEMENT SERVICES	B	25000	69.66
521005	TITANIN	SECPL ENGINEERING CONSTRUCTION PRIVATE LIMITED	S	161954	30.25
519367	TRANSFD	KHUSHBOO R SHAH	B	889	290.5
531015	VENMAX	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	31476	26.4

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AGARWALTUF	Agarwal Tough Glass Ind L	GINNI FINANCE PRIVATE LIMITED	BUY	198000	117.49
AGARWALTUF	Agarwal Tough Glass Ind L	KVIJAY VENTURES LLP	SELL	151200	117.33
C2C	C2C Advanced Systems Lt	MUKUL AGGARWAL	SELL	84000	713.81
GLOBE-RE1	Globe Textiles Ltd	RAGHAV KAROL HUF	BUY	4221950	0.59
HEADSUP	Heads UP Ventures Limited	KETAN RATILAL PATEL	SELL	170000	11.45
HEADSUP	Heads UP Ventures Limited	MARUTINANDAN CAPITAL PRIVATE LIMITED	BUY	170000	11.45
OLIL	Oneclick Logistics Ind L	MATALIA STOCK BROKING PRIVATE LIMITED	SELL	24000	125.26
PELATRO	Pelatro Limited	SB OPPORTUNITIES FUND I	SELL	60000	395.04
SHANTI	Shanti Overseas (Ind) Ltd	MAHEVARSH FINCON PRIVATE LIMITED	BUY	200000	16.3
SHANTI	Shanti Overseas (Ind) Ltd	MAHOGANY ADVISORY AND TRADING LLP	SELL	195880	16.3
VALIANTLAB	Valiant Laboratories Ltd	JAINAM BROKING LIMITED	SELL	550000	105.77
VALIANTLAB	Valiant Laboratories Ltd	MONEY LOGIX SECURITIES PVT LTD	BUY	550000	105.78

Disclosure:

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