

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	42732	42392	340	0.8%
Dow Futures	42970	43021	(51)	-0.1%
Nasdaq	19622	19281	341	1.8%
FTSE	8224	8260	(36)	-0.4%
Nikkei	39394	39895	(500)	-1.3%
Hang Seng	19763	19760	3	0.0%
Gift Nifty	24139	24099	40	0.2%
Straits Singapore	3813	3802	11	0.3%
South Korea	2477	2442	35	1.4%
Taiwan	23438	22908	529	2.3%
Shanghai	3217	3211	5	0.2%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8877	8803	74	0.8%
Alumin (\$/MT)	2494	2529	(36)	-1.4%
Zinc (\$/MT)	2888	2927	(39)	-1.3%
Brent Crude (\$/bbl)	77	77	(0)	0.0%
Gold (\$/Ounce)	2644	2640	4	0.2%
Silver (\$/Ounce)	30	30	0	0.3%
Light Crude (\$/bbl)	74	74	0	0.0%
N G (\$/mmbtu)	4	3	0	4.9%
Sugar (\$/MT)	514	513	1	0.2%
Rubber (Rs./kg)	191	192	(2)	-0.8%
Baltic Dry Index	1072	1029	43	4.2%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	85.78	85.76	0.02%
Rs./ Euro	88.26	88.77	-0.58%
Rs./ Chinese Yuan	11.72	11.75	-0.22%
Yen / \$ rate	157.72	157.26	0.29%
\$ US/Euro	1.03	1.03	0.08%

Dollar Index	Current	Previous	Var(%)
Dollar Index	108.88	108.95	-0.07%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	23940	51000
Support 2	23870	50700
Resistance	24070	51500

Securities in Ban For Trade	
MANAPPURAM	RBLBANK

Market Review

US: All three Wall Street indices closed on a positive note on Friday, with S&P 500 looking to snap its five-day losing streak.

Asia: Markets in the Asia Pacific showed movement early in the day even as Wall Street bounced back from a five-day rout.

India: The NSE Nifty 50 and BSE Sensex snapped their two-day winning streak on Friday. However, the benchmarks rose for the second consecutive week. **Market is expected to open on a positive note and likely to witness range bound move during the day.**

Global economy: U.S. manufacturing moved closer to recovery in December, with production rebounding and new orders rising further, but the outlook remains uncertain amid the threat of higher tariffs that could raise prices of imported raw materials. Seven industries, including primary metals, electrical equipment, appliances and components as well as paper products and miscellaneous manufacturing reported growth last month. Among the seven industries reporting contraction were textile mills, machinery and transportation equipment.

The number of unemployed people in Germany rose by 10,000 in December, reaching a seasonally adjusted total of 2.87 million, according to the federal labour office. This increase was less than the expected rise of 15,000. The average unemployment rate for 2024 edged up to 6.0%, compared to 5.7% in 2023. Additionally, there were 654,000 job openings in December, 59,000 fewer than a year ago, indicating a slowdown in labour demand.

Commodities: Oil prices hovered at their highest since October on Monday as investors eyed the impact on global fuel demand from colder weather in the Northern Hemisphere and Beijing's economic stimulus measures.

Gold prices held steady on Monday as investors awaited a slew of U.S. economic data due out this week for guidance on the Federal Reserve's interest rate stance.

Currency: The dollar strayed not too far from a two-year peak on Monday as traders awaited a raft of U.S. economic data releases this week, headlined by December's nonfarm payrolls report, for further clues on the Federal Reserve's rate outlook.

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	52138	3468	79786	5389	(1921)	350522	23619	332116	22490	18406	1129
Index Option	5544958	799849	5613924	802980	(3131)	3984831	429231	3072693	293846	912138	135385
Stock Future	364770	23677	381599	25100	(1423)	5293273	344865	5249530	343190	43743	1675
Stock Option	1083426	71054	1082521	71093	(39)	920014	59919	837073	54572	82941	5347
Total	7045292	898048	7157830	904562	(6514)	10548640	857634	9491412	714098	1057228	143536

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
27-Dec-24	7656	7286	370
30-Dec-24	16200	17799	(1599)
31-Dec-24	5280	10631	(5351)
1-Jan-25	2399	2996	(597)
2-Jan-25	14051	12387	1664
Month to date- Jan	16450	15384	1066
FII (Prov.) (Rs Cr)	Buy	Sell	Net
30-Dec-24	15508	17401	(1893)
31-Dec-24	5950	10595	(4645)
1-Jan-25	1237	3020	(1783)
2-Jan-25	13403	11896	1507
3-Jan-25	10813	15040	(4227)
Month to date-Jan	25453	29956	(4503)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
30-Dec-24	41787	39613	2174
31-Dec-24	13550	9004	4547
1-Jan-25	8537	6847	1690
2-Jan-25	14177	14154	22
3-Jan-25	14333	13512	821
Month to date-Jan	37046	34513	2533
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
27-Dec-24	1443	3097	(1654)
30-Dec-24	2188	2745	(557)
31-Dec-24	4075	8598	(4523)
1-Jan-25	9	860	(851)
2-Jan-25	1749	2233	(484)
Month to date- Jan	1758	3093	(1335)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2032	50%	1449	50%
Decline	1965	48%	1360	47%
Unchanged	106	3%	66	2%

Market Turnover	03-Jan	02-Jan	Var (%)
BSE Cash	6399	5714	12%
NSE Cash	106094	99416	7%
NSE Futures	123208	133823	-8%
NSE Options	8947767	41062388	-78%
Total (Rs.Cr)	9183468	41301341	-78%

Volatility Index	03-Jan	02-Jan
Volatility Index	13.54	13.74

Index PE - TTM	03-Jan	Yr. High	Yr. Low
Sensex	23.0	26.0	21.8
Nifty	22.1	28.8	20.8

Corporate News

Visakhapatnam Port Authority signs MoU with RVNL

The company executed MoU with Visakhapatnam Port Authority for construction of internal flyovers to enhance the smooth evacuation of cargo and eliminate the eleven level crossings that are currently hindering the free flow of traffic at VPA. (NDTV)

Brigade Group acquires 20 acres land in Bengaluru for Rs 630 crore

The company signed a definitive agreement for a prime land parcel located in Bengaluru for developing a residential project spanning about 20 acres. The project will have a total saleable area of approximately 2.5 million square feet with a GDV of about Rs 2,700 crore and a total land cost of about Rs 630 crore through its subsidiary Ananthay Properties. (MC)

Deep Industries Limited Receives Letter of Award from ONGC

The company received letter of award from ONGC for charter hiring of one number of 100MT Workover Rig for a period of seven years for Assam Asset. The total estimated value of the said award is approximately Rs 90.70 crores. (NDTV)

Economy

Govt permits export of 2 lakh tonne wheat to Nepal

The government has approved the export of 2 lakh tonnes of wheat to Nepal via NCEL, despite a general wheat export ban. Separately, the DGFT exempted advance authorization holders, EOUs, and SEZs from the \$3.5/kg minimum import price condition on synthetic knitted fabric imports to support production and trade. (ET)

Telangana CM Revanth Reddy orders release of Rs 1,000 crore for rural road construction

Telangana Chief Minister Revanth Reddy instructed the State Finance department officials to release Rs 1,000 crore for the construction of rural roads. Emphasizing broader and better roads to accommodate increased traffic, CM Reddy mandated uniform quality standards for Panchayat Raj and R&B roads and immediate repairs for potholed roads. (ET)

International

Paychex in talks to buy smaller payroll firm Paycor

Paychex Inc is in talks to buy smaller rival Paycor, as the human resources firm looks to consolidate its market share amid improving earnings. New York-based Paychex has benefited from a robust U.S. labor market over the past year, while its artificial intelligence-powered HR services also saw increased demand. The stock rose about 18% in 2024, having hit a record high in early-December. (Inv)

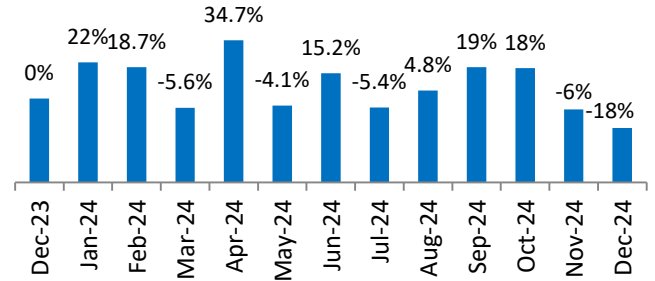
Top 5 Nifty Gainers	03-Jan	02-Jan	Var(%)
ONGC	259	246	5.2%
TATAMOTORS	790	765	3.3%
TITAN	3452	3389	1.9%
SBILIFE	1448	1422	1.8%
HINDUNILVR	2406	2370	1.5%
Top 5 Nifty Losers	03-Jan	02-Jan	Var(%)
WIPRO	294	304	-3.1%
HDFCBANK	1749	1794	-2.5%
N.A.	N.A.	N.A.	N.A.
N.A.	N.A.	N.A.	N.A.
N.A.	N.A.	N.A.	N.A.

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	79223	-0.9%	0.7%	-3.0%	10.0%
MIDCAP	46936	-0.3%	1.3%	-1.5%	24.5%
SMLCAP	56116	0.0%	1.9%	-1.6%	28.1%
AUTO	54172	-0.1%	3.7%	0.0%	29.8%
BANKEK	57928	-1.1%	-0.5%	-5.0%	6.7%
Capital Goods	68211	-1.1%	0.1%	-6.3%	21.3%
FMCG	21118	0.1%	2.4%	-0.3%	1.8%
Health Care	45336	-0.7%	1.6%	1.9%	39.2%
IT	43679	-1.3%	0.2%	-1.9%	23.1%
METAL	29215	0.2%	0.1%	-7.8%	10.3%
Oil & Gas	26818	1.5%	3.7%	-1.9%	13.1%
Power	7034	-0.4%	0.7%	-7.8%	16.9%
Realty	8181	-0.6%	-2.1%	-2.5%	22.5%

NSE USD Futures	03-Jan	02-Jan	Var (%)
Jan Expiry (Rs./\$)	85.76	84.88	1.0%
Feb Expiry (Rs./\$)	85.76	84.39	1.6%
Total Turnover (Rs. Crore)	3732	5813	-36%

Sectors	TTM PE
Auto	30.77
Auto Ancillary	47.23
Banking	13.95
Engineering	50.54
Cement	88.58
Diamonds & Jewellery	60.29
Housing Finance	25.78
Infrastructure & Const	34.58
Metals-Aluminium	38.27
Metal – Steel	16.74
Oil Expl.	12.91
Pharma	9.63
Power – Gen. Supp.	45.35
Information Tech.	27.85
Sugar	23.89
Telecom Serv. Prov.	70.29
Tyres	28.99

Hero Moto: Monthly Sales Volume Growth (YoY)
(Source: Company Data)



10 year G-Sec Yield	Current	Previous	Change
US	4.62%	4.60%	2 bps
Japan	1.13%	1.10%	3 bps
India	6.78%	6.79%	(1) bps
UK	4.59%	4.60%	(0) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	640	640	0.0%
Inflation - WPI	1.89%	2.36%	(47) bps
Inflation - CPI	5.48%	6.21%	(73) 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)	-615	-818	203.4

IIP Growth %	Oct-24	Oct-23	Apr-Feb
IIP	3.5	11.9	4.3
Capital Goods	3.1	21.7	4.0
Mining	4.1	10.6	3.8
Manufacturing	2.0	20.4	6.1
Electricity	0.9	13.1	4.0

Bulk Deal As On 03/01/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
543319	AAPLUSTRAD	SANJEEV HARBANSLAL BHATIA	S	432000	14.61
543319	AAPLUSTRAD	SUUMAYA INDUSTRIES LIMITED	B	432000	14.61
543377	ADISHAKTI	SHAH DIPAK KANAYALAL	S	30000	13.2
543453	ALKOSIGN	MUKUL ROHATGI	B	92250	125.56
538465	AMARSEC	NEELAM RAGHUNATH GUPTA	S	43047	21.62
538465	AMARSEC	RUCHIRA GOYAL	B	48711	21.61
540135	ARCFIN	ISHAAN TRADEFIN LLP	S	7500000	1.54
540135	ARCFIN	ISHAAN TRADEFIN LLP	B	8000000	1.5
540135	ARCFIN	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	5000000	1.54
540135	ARCFIN	SAJM GLOBAL IMPEX PRIVATE LIMITED	S	53010271	1.51
540135	ARCFIN	SAJM GLOBAL IMPEX PRIVATE LIMITED	B	14559835	1.54
513401	ASHIS	KAMLESH VALLABHDAS SIRODARIA	S	75000	49.92
513401	ASHIS	MAGNUM HEALTH AND SAFETY PRIVATE LIMITED	B	165000	49.36
513401	ASHIS	RAKHEE RAKESH BHAGAT	B	40000	49.05
544324	CITICHEM	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	B	86000	69.76
512361	CUPIDALBV	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	8945	72.75
543378	CWD	PANKAJ PRASOON	B	20700	856.66
531364	EKANSH	AZURA PROJECTS PRIVATE LIMITED	S	230000	145.09
531364	EKANSH	GOPI KISHAN MALANI	B	150000	145.1
512441	ENBETRD	HITESH SINGH	S	170000	12.98
512443	GANONPRO	JAI VINAYAK SECURITIES	B	69394	9.1
512443	GANONPRO	YOGESHKUMARSHUKLA	S	96493	9.09
513337	GUJTLRM	ANKIT MAHENDRABHAI PARLESHA	B	1580311	18.98
513337	GUJTLRM	ANKIT MAHENDRABHAI PARLESHA	S	1580311	18.98
513337	GUJTLRM	HITESH SINGH	B	4372208	18.97
513337	GUJTLRM	HITESH SINGH	S	4372208	18.98
513337	GUJTLRM	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	1250000	18.97
513337	GUJTLRM	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	1074443	18.98
513337	GUJTLRM	NORTH STAR OPPORTUNITIES FUND VCC-BULL VALUE INCORPORATED VCC SUB-FUND	S	10000000	18.98
544312	HAMPS	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	72000	81.84
541627	HITECHWIND	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	39378	9.18
539449	IGCIL	SHERWOOD SECURITIES PVT LTD	S	227632	8.48
540134	IISL	KRISHNA TRADE FINANCE	S	220111	9.53
540134	IISL	VICKY R JHAVERI HUF	B	137000	9.55
524614	INDXTRA	SIDDAPPA VEERAPPA HAGARAGI	B	176410	6.74
517063	JETKINGQ	MEENAKSHI SHARMA	S	30000	104.1
517063	JETKINGQ	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	127901	104.1
539519	MAYUKH	JR SEAMLESS PRIVATE LIMITED	S	961380	2.31
539762	MEAPL	MITHUN SECURITIES PRIVATE LIMITED	S	350000	42.28
539762	MEAPL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	100000	42.28
539762	MEAPL	WESSEL CONSULTANCY PRIVATE LIMITED	S	222851	42.28
539220	MISHKA	AGRILOFT ENTERPRISES PRIVATE LIMITED	S	81276	48.49
544313	NACDAC	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	116000	81.34
543207	NATURAL	HEMA JAYPRAKASH BHAVSAR	B	259735	13.7
543207	NATURAL	ROOPESH TALWAR	S	184014	13.5
519479	OMEAG	DIVYA KANDA	B	50000	8.04
519479	OMEAG	JIGAM SHASHIKANT GANDHI	S	56677	8.04
519479	OMEAG	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	87000	8.04
519479	OMEAG	PACE STOCK BROKING SERVICES PVT LTD	S	53306	8.04
543400	OMNIPOTENT	PUNIT KIRITKUMAR POPAT	S	570000	8.16

543400	OMNIPOTENT	RAVI ASHOK KOTHARI	B	348000	8.46
543400	OMNIPOTENT	TEENA KIRTI JAIN	S	124000	8.99
543400	OMNIPOTENT	TEENA KIRTI JAIN	B	124000	8.82
543400	OMNIPOTENT	VIHA ASHOK JAIN	B	150000	8.24
543400	OMNIPOTENT	VIRAL PRAFUL JHAVERI	S	40000	8.81
543400	OMNIPOTENT	VIRAL PRAFUL JHAVERI	B	40000	8.16
543400	OMNIPOTENT	ZULIA ZAFAR	B	50000	8.16
526345	PANJON	SHAH DIPAK KANAYALAL	S	159824	27.24
512591	PULSRIN	PANKAJKUMARDALPATBHAIPANCHAL	S	473708	15.87
512097	SAICOM	PRAKASH GILLA	S	1143530	0.4
511577	SAVFI	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	28009	21.87
540072	SHIVAEXPO	MAULIK CHANDRAKANTBHAI THAKKER	S	70000	20.39
540072	SHIVAEXPO	SINGH GARIMA DINESHKUMAR	B	70000	20.39
543924	SONALIS	NEENA KASHYAP	S	12000	64.76
543924	SONALIS	PILKHWAL	S	18000	63.12
543924	SONALIS	VIRAL PRAFUL JHAVERI	B	14000	64.2
521005	TITANIN	PVV AGRO PRIVATE LIMITED	B	198500	40.29
521005	TITANIN	SECPL ENGINEERING CONSTRUCTION PRIVATE LIMITED	S	205805	40.28
542765	TRANSACT	VIGNESH KUMAR AGARWAL	S	2500	197
542765	TRANSACT	VISHAL MAHESH WAGHELA	S	14000	206.48
542765	TRANSACT	YOGESH PRASANLAL DAGLI	B	17000	205.07
544303	TTC	EPITOME TRADING AND INVESTMENTS	S	12000	715.3
544303	TTC	EPITOME TRADING AND INVESTMENTS	B	13800	713.8
544303	TTC	JATIN MAHENDRA SHAH (HUF)	B	16200	698.39
544303	TTC	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	9000	708.83
544303	TTC	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	B	16200	714.4
541338	UHZAVERI	AKASHBHAI BHARATKUMAR SHAH	S	52540	15.8
541338	UHZAVERI	AKASHBHAI BHARATKUMAR SHAH	B	4997	15.66
543513	UMAEXPORTS	ASCENDANT REALTY LLP	S	181491	110
532378	UNIVARTS	MAYUR MANGALDAS KOTHARI	S	50000	7.49
511509	VIVBIOT	EVERY WEAR IMPORT AND EXPORT PRIVATE LIMITED	S	237448	41.61
531337	WINPRO	MUKESHKUMAR HARISHKUMAR TEKWANI	B	555555	4.51
544310	YASHHV	SOHAM FINCARE INDIA LLP	S	147000	319.95
544310	YASHHV	SOHAM FINCARE INDIA LLP	B	147000	319.47

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AGARWALTUF	Agarwal Tough Glass Ind L	NECTA BLOOM VCC - NECTA BLOOM ONE	SELL	1,15,200	128.05
AGARWALTUF	Agarwal Tough Glass Ind L	SHUBHAM FINANCIAL SERVICES	BUY	1,15,200	128.05
AVONMORE	Avonmore Cap&Mgt Serv Ltd	DILIPKUMAR VISHINDAS LAKHI	SELL	21,50,000	23.36
EMKAYTOOLS	Emkay Tap & Cut. Tool Ltd	AJAYPRAKASH MURLIDHAR KANORIA HUF	SELL	2,55,150	485.28
EMKAYTOOLS	Emkay Tap & Cut. Tool Ltd	NAGPUR TOOLS PVT LTD	BUY	2,56,650	485.37
HARDWYN	Hardwyn India Limited	SHALINI JAIN	SELL	25,48,991	19.19
IDENTICAL	Identical Brains Studio L	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	78000	73.7
MHHL	Mohini Health&Hygiene Ltd	AJEET MODI HUF	BUY	1,02,000	64.75
MOKSH	Moksh Ornaments Limited	INVESTI GLOBAL OPPORTUNITY FUND PCC - CELL 1	BUY	5,00,000	20.33
NMSTEEL	Newmalayalam Steel Ltd	CRAFT EMERGING MARKET FUND PCC- ELITE CAPITAL FUND	SELL	4,00,000	72.01
NMSTEEL	Newmalayalam Steel Ltd	NEOMILE GROWTH FUND - SERIES I	BUY	3,87,200	72
OLIL	Oneclick Logistics Ind L	ABHAY CHANDRAKANT LAKHANI	SELL	26400	108
OLIL	Oneclick Logistics Ind L	BHUMIKABEN NAYANBHAI MANGUKIYA	BUY	21600	104.21
OLIL	Oneclick Logistics Ind L	GIRIRAJ STOCK BROKING PRIVATE LIMITED	BUY	26400	108
PROZONER	Prozone Realty Limited	SARASWATI COMMERCIAL (INDIA) LTD	BUY	27,01,100	38.09
SECL	Salasar Exterior Cont Ltd	MALANI WEALTH ADVISORS PRIVATE LIMITED	BUY	12,50,000	18.82
SECL	Salasar Exterior Cont Ltd	SANJEEV HARBANSLAL BHATIA	SELL	14,50,000	18.93
SHANTHALA	Shanthala FMCG Products L	PRASHANT D PAWAR	SELL	73200	39.35
SHANTHALA	Shanthala FMCG Products L	VIRTUOUS CAPITAL LIMITED	BUY	75600	39.33
SYSTANGO	Systango Technologies Ltd	SNEHABHANDARI	BUY	1,13,600	285.99
UMAEXPORTS	Uma Exports Limited	AKSHAYA LANDS & PROPERTIES LLP	BUY	1,81,491	110.1
VERANDA	Veranda Learning Sol Ltd	HARSH ANANDKUMAR JAIN	BUY	4,05,000	244.72
VERANDA	Veranda Learning Sol Ltd	SUSHMA ANAND JAIN	SELL	4,00,000	244.72

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