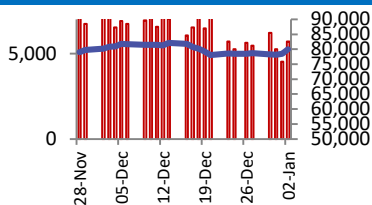
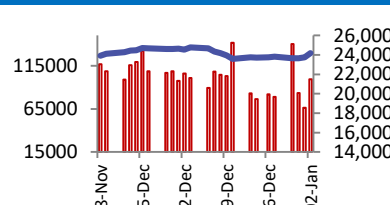


BSE



Open	78658
High	80033
Low	78542
Close	79944
Change	1436
Volume (Lacs)	6622
Turnover (Rs.inCr)	5714

NSE



Open	23783
High	24227
Low	23752
Close	24189
Change	446
Volume(Lacs)	31538
Turnover(Rs.in Cr)	99416

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	42392	42544	(152)	-0.4%
Dow Futures	42746	42694	52	0.1%
Nasdaq	19281	19311	(30)	-0.2%
FTSE	8260	8173	87	1.1%
Nikkei	39895	39895	Closed	Closed
Hang Seng	19818	19623	195	1.0%
Gift Nifty	24179	24159	21	0.1%
Straits Singapore	3806	3801	5	0.1%
South Korea	2444	2399	45	1.9%
Taiwan	22933	22832	101	0.4%
Shanghai	3257	3263	(6)	-0.2%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8803	8768	35	0.4%
Alumin (\$/MT)	2529	2552	(23)	-0.9%
Zinc (\$/MT)	2927	2979	(52)	-1.7%
Brent Crude (\$/bbl)	76	76	0	0.3%
Gold (\$/Ounce)	2662	2658	4	0.1%
Silver (\$/Ounce)	30	30	0	0.1%
Light Crude (\$/bbl)	73	73	0	0.4%
N G (\$/mmbtu)	4	4	(0)	-0.1%
Sugar (\$/MT)	513	507	6	1.2%
Rubber (Rs./kg)	192	192	0	0.0%
Baltic Dry Index	1029	997	32	3.2%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	85.76	85.65	0.12%
Rs./ Euro	88.77	88.70	0.08%
Rs./ Chinese Yuan	11.75	11.72	0.25%
Yen / \$ rate	157.33	157.50	-0.11%
\$ US/Euro	1.03	1.03	0.08%

Dollar Index	Current	Previous	Var(%)
Dollar Index	109.16	109.39	-0.21%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24070	51570
Support 2	24000	51240
Resistance	24240	52000

Securities in Ban For Trade	
MANAPPURAM	RBLBANK

Market Review

US: The US stock markets opened higher on the first trading session of 2025, after the New Year break on January 2, as investors eye a fresh political landscape and more interest rate cuts to fuel the nation's economy.

Asia: Asian indices traded higher in early trade on Friday even as the Wall Street closed lower.

India: The Indian benchmarks closed higher for the second consecutive day on Thursday and recorded their best sessions since Nov. 22. Both the equity indices saw their highest closing since Dec. 18. **Market is expected to open on a gap down note and likely to witness sideways move during the day.**

Global economy: Canadian manufacturing activity increased at the fastest pace in nearly two years in December as inventory accumulation by U.S. clients in anticipation of trade tariffs provided a measure of support for export sales. The S&P Global Canada Manufacturing Purchasing Managers' Index (PMI) rose to 52.2 in December from 52.0 in November, its highest level since February 2023 and the fourth straight month above the 50.0 no-change mark.

Hong Kong's November retail sales fell 7.3% by value from a year earlier, reflecting a change in consumption patterns and the relatively strong Hong Kong dollar. Sales fell to HK\$31.7 billion (\$4.08 billion) in a ninth consecutive month of decline after a revised 2.8% drop in October.

Commodities: Oil prices extended their gains on Friday after closing at their highest in more than two months in the previous session on hopes governments across the world may increase policy support to revive economic growth that would lift fuel demand.

Gold prices edged higher on Friday, building on a 1% gain from the previous session, boosted by safe-haven demand, while focus on the Fed's rate outlook and U.S. President-elect Trump's proposed trade tariffs.

Currency: The dollar was on track for its best weekly performance in over a month on Friday, underpinned by expectations of fewer Federal Reserve rate cuts this year and the view that the U.S. economy will continue to outperform the rest of its peers globally.

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	86846	5504	54996	3633	1871	332116	22490	321194	21493	10922	997
Index Option	16978564	2857840	17131388	2881399	(23559)	3072693	293846	4039236	467840	(966543)	(173994)
Stock Future	542080	35849	371426	24241	11608	5249530	343190	5149118	331622	100412	11568
Stock Option	1057780	71278	1072361	72223	(945)	837073	54572	734638	47034	102435	7538
Total	18665270	2970471	18630171	2981496	(11025)	9491412	714098	10244186	867989	(752774)	(153891)

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
26-Dec-24	6527	8119	(1592)
27-Dec-24	7656	7286	370
30-Dec-24	16200	17799	(1599)
31-Dec-24	5280	10631	(5351)
1-Jan-25	2399	2996	(597)
Month to date- Jan	2399	2996	(597)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
27-Dec-24	5368	6692	(1323)
30-Dec-24	15508	17401	(1893)
31-Dec-24	5950	10595	(4645)
1-Jan-25	1237	3020	(1783)
2-Jan-25	13403	11896	1507
Month to date-Jan	14640	14916	(276)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
27-Dec-24	9437	6892	2545
30-Dec-24	41787	39613	2174
31-Dec-24	13550	9004	4547
1-Jan-25	8537	6847	1690
2-Jan-25	14177	14154	22
Month to date-Jan	22714	21001	1713
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
26-Dec-24	2579	1327	1252
27-Dec-24	1443	3097	(1654)
30-Dec-24	2188	2745	(557)
31-Dec-24	4075	8598	(4523)
1-Jan-25	9	860	(851)
Month to date- Jan	9	860	(851)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2339	57%	1791	62%
Decline	1635	40%	1018	35%
Unchanged	112	3%	69	2%

Market Turnover	02-Jan	01-Jan	Var (%)
BSE Cash	5714	4519	26%
NSE Cash	99416	66507	49%
NSE Futures	133823	70391	90%
NSE Options	41062388	15410290	166%
Total (Rs.Cr)	41301341	15551707	166%

Volatility Index	02-Jan	01-Jan
Volatility Index	13.74	14.51

Index PE - TTM	02-Jan	Yr. High	Yr. Low
Sensex	23.2	26.0	21.8
Nifty	22.3	28.8	20.8

Corporate News

Hindustan Zinc Q3 Metal Output: Mine Metal Production at 265 Kilotonnes, Down 2%

Hindustan Zinc Ltd. announced that its mine metal production in the third quarter of fiscal 2025 dropped 2% YoY at 265 kilotonnes. A decline in ore production at Agucha and SK mines was partly offset by improved mined metal grades and mill recovery. (NDTV)

Heubach Colorants suspends production after fire at Maharashtra plant, says damage 'adequately covered'

Specialty chemicals company Heubach Colorants reported about a fire incident at its Roha Plant in Maharashtra's Raigad district, due to which it has temporarily suspended operations at the factory and is in the process of ascertaining the damage. (MC)

Varun Beverages Strengthens South Africa Presence with Rs 413 Cr Investment in Subsidiary

Varun Beverages Ltd. has invested Rs 412.80 cr in its subsidiary Beverage Company Proprietary Ltd. based in South Africa through the subscription of ordinary shares. (NDTV)

Economy

India sugar production declines by 16pc to 95.40 lakh tn in Oct-Dec: ISMA

Sugar production decreased by 16% to 95.40 lakh tonne in the first quarter of the current marketing year starting in October. Production declined mainly due to lower output in Maharashtra. Mills had manufactured 113.01 lakh tonnes in the same period last year. The data excludes sugar diverted for ethanol production. (ET)

India's Dec factory activity growth hits 2024 low, PMI shows

India's manufacturing activity in December 2024 slowed to its weakest pace of the year, despite easing cost pressures and strong jobs growth. The HSBC final PMI fell slightly from November, with slower improvements in output and new orders. International demand improved, supporting exports, but business sentiment and future growth outlook waned. (ET)

International

Morgan Stanley to leave sector climate coalition

Investment bank Morgan Stanley has decided to leave the Net-Zero Banking Alliance, becoming the latest U.S. lender to quit the sector's top global climate coalition. While the bank gave no reason for its decision, top banks have been under pressure from some U.S. Republican politicians over their membership, with accusations that any move to limit finance to fossil fuel companies could breach antitrust rules. (Inv)

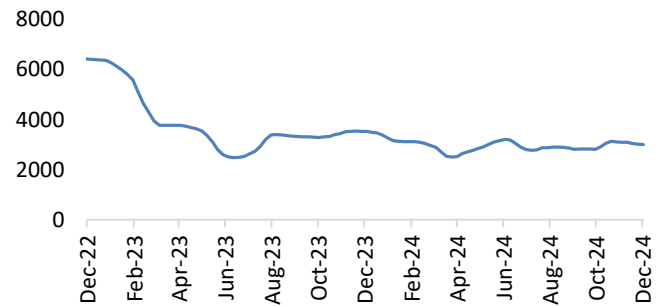
Top 5 Nifty Gainers	02-Jan	01-Jan	Var(%)
EICHERMOT	5308	4885	8.7%
BAJAJFINSV	1701	1576	7.9%
BAJFINANCE	7389	6935	6.5%
MARUTI	11841	11208	5.6%
SHRIRAMFIN	3060	2919	4.8%
Top 5 Nifty Losers	02-Jan	01-Jan	Var(%)
SUNPHARMA	1878	1890	-0.6%
BRITANNIA	4788	4795	-0.1%
N.A.	N.A.	N.A.	N.A.
N.A.	N.A.	N.A.	N.A.
N.A.	N.A.	N.A.	N.A.

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	79944	1.8%	1.9%	-1.1%	12.0%
MIDCAP	47092	0.9%	1.6%	0.2%	27.0%
SMLCAP	56127	0.7%	2.2%	-0.2%	30.2%
AUTO	54213	3.7%	4.7%	0.9%	30.4%
BANKEK	58556	1.1%	0.7%	-2.4%	9.0%
Capital Goods	68939	0.5%	0.5%	-4.0%	25.3%
FMCG	21088	1.1%	2.6%	-0.2%	2.4%
Health Care	45648	0.4%	3.1%	3.0%	40.5%
IT	44260	2.3%	1.7%	1.7%	26.6%
METAL	29148	1.0%	-1.4%	-6.7%	9.9%
Oil & Gas	26425	1.2%	1.2%	-2.7%	12.4%
Power	7063	0.4%	0.3%	-7.1%	19.8%
Realty	8229	1.1%	-1.9%	-0.1%	32.0%

NSE USD Futures	02-Jan	01-Jan	Var (%)
Jan Expiry (Rs./\$)	84.88	84.88	0.0%
Feb Expiry (Rs./\$)	84.39	84.39	0.0%
Total Turnover (Rs. Crore)	5813	1782	226%

Sectors	TTM PE
Auto	29.37
Auto Ancillary	46.74
Banking	14.02
Engineering	49.63
Cement	84.85
Diamonds & Jewellery	55.37
Housing Finance	25.57
Infrastructure & Const	34.66
Metals-Aluminium	37.5
Metal – Steel	16.47
Oil Expl.	13.21
Pharma	8.88
Power – Gen. Supp.	44.78
Information Tech.	27.38
Sugar	24.2
Telecom Serv. Prov.	69.86
Tyres	29.82

Bromine Price: China (\$/MT) (Source: BBG)



10 year G-Sec Yield	Current	Previous	Change
US	4.56%	4.57%	(1) bps
Japan	1.10%	1.10%	0 bps
India	6.79%	6.78%	1 bps
UK	4.60%	4.57%	3 bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	644	644	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)	-818	-1091	273.1

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

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	22.62	6556203	21.92	2304258	3.19%	1	1939.86	1957.85	-0.9%
Wipro	3.57	2381667	3.54	2107230	0.85%	1	306.16	303.80	0.8%
Dr.Reddy's	15.67	1443385	15.79	2183645	-0.76%	1	1343.84	1375.05	-2.3%
ICICI Bank	29.81	2294383	29.86	1627783	-0.17%	2	1278.23	1290.60	-1.0%
HDFC Bank	64.06	1460255	63.86	1640633	0.31%	3	1831.24	1793.75	2.1%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	43.00	42.00	1.0	2.4%
RIL	57.60	56.80	0.8	1.4%
SBI	93.20	92.60	0.6	0.6%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.70%	2.60%
Unemployment (%)	4.20%	4.10%

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 (%)	0.20%	0.30%

Economic Calendar

Economic Calendar	Date
Indian GDP Data	28 Feb
Indian Inflation Data CPI	13 Jan
Indian Inflation Data WPI	14 Jan
Indian Monetary Policy	07 Feb
India's Industrial Production (IIP)	10 Jan
US Inflation Data	15 Jan
US GDP	30 Jan
US Unemployment Data	10 Jan
US Fed Rate	30 Jan
China GDP	15 Jan
China Inflation Data	9 Jan

Event Update

Name	Date	Purpose
Banganga Paper Industries Ltd.	03/01/25	Stock Split from Rs.10/- to Re.1/-
Enser Communications Ltd.	03/01/25	Bonus issue
Garware Technical Fibres Ltd.	03/01/25	Bonus issue
KPI Green Energy Ltd.	03/01/25	Bonus issue
Redtape Ltd.	03/01/25	Rs.2.00 per share(100%)Interim Dividend
Jagsonpal Pharmaceuticals Ltd.	08/01/25	Stock Split from Rs.5/- to Rs.2/-
Julien Agro Infratech Ltd.	08/01/25	Stock Split from Rs.10/- to Rs.5/-
Kamdheni Ltd.	08/01/25	Stock Split from Rs.10/- to Re.1/-
Shriram Finance Ltd.	10/01/25	Stock Split from Rs.10/- to Rs.2/-
Jai Balaji Industries Ltd.	17/01/25	Stock Split from Rs.10/- to Rs.2/-
Manba Finance Ltd.	05/02/25	Second Interim Dividend
Computer Age Management Services Ltd.	07/02/25	Interim Dividend

Bulk Deal As On 02/01/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539506	ADCON	ARUN S PAI	B	1369862	1.08
513401	ASHIS	BHAVEN MANSUKHLAL SHETH HUF	S	50000	41.01
513401	ASHIS	KAMLESH VALLABHDAS SIRODARIA	B	75000	41.15
513401	ASHIS	RAKHEE RAKESH BHAGAT	S	40000	41.34
526853	BI	SHAH SHARAD KANAYALAL	B	231000	81.47
526546	CHOKSILA	CSG FINANCIAL & MANAGEMENT SERVICES PRIVATE LIMITED	B	63200	96.75
539091	CITL	ZULIA ZAFAR	B	911429	2.52
539770	DARJEELING	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	17091	38.75
539884	DARSHANORNA	SAKSHI GUPTA	S	500000	3.17
539405	DITCO	VIPUL UTSAVLAL KANUNGA HUF	S	22131	12.75
521137	EUREKAI	ANAND SINGHI	B	46806	10.49
521137	EUREKAI	CHINTAN NAYAN BHAI RAJYAGURU	S	54894	10.62
512443	GANONPRO	JR SEAMLESS PRIVATE LIMITED	B	100000	9
512443	GANONPRO	YOGESHKUMARSHUKLA	S	63004	9.01
514386	GUJCOTEX	PRASHANT GUPTA	B	142645	15.56
513337	GUJTLRM	EMINENCE GLOBAL FUND PCC- EUBILIA CAPITAL PARTNERS FUND I	S	11000000	18.08
544312	HAMPS	ISHAAN TRADEFIN LLP	S	42000	75.9
544312	HAMPS	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	B	92000	75.5
544312	HAMPS	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	84000	75.35
539449	IGCIL	ISHAAN TRADEFIN LLP	S	200000	8.92
544304	JUNGLECAMP	SOHAM FINCARE INDIA LLP	B	80000	95.02
544304	JUNGLECAMP	SOHAM FINCARE INDIA LLP	S	78400	95.06
544313	NACDAC	GOWTHAMANABILASH	B	160000	70.93
544313	NACDAC	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	40000	70.93
544313	NACDAC	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	B	184000	70.93
544313	NACDAC	SETU SECURITIES PVT. LTD.	S	56000	70.93
543400	OMNIPOTENT	PUNIT KIRITKUMAR POPAT	S	208000	8.6
543400	OMNIPOTENT	SUMANTEKRIWAL	B	66000	8.69
543997	ORGANICREC	ANANT WEALTH CONSULTANTS PRIVATE LIMITED	S	100200	338.1
531280	PANKAJPO	MADHUSUDAN RAO POLINENI	B	37000	12.65
531280	PANKAJPO	PREMIUM CAPITAL MARKET & INVESTMENTS LIMITED .	S	43448	12.65
532911	PARLEIND	ANKIT AGRAWAL	S	78853	29.78
540703	PROCLB	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	29309	49.22
540259	SHANGAR	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	898261	4.66
539278	SYMBIOX	VAKANDA SERVICES PRIVATE LIMITED	B	231605	5.37
544214	THREEMPAPE	KAILASH J WAGHELA	S	108000	63.82
544303	TTC	JATIN MAHENDRA SHAH (HUF)	B	12000	618.11
544303	TTC	SOHAM FINCARE INDIA LLP	S	10200	604.56
544303	TTC	SOHAM FINCARE INDIA LLP	B	10200	598.09
542803	VEL	MAKWANA DIXIT CHANDUBHAI	S	200000	10.5
542803	VEL	PIYUSH SECURITIES PVT LTD	B	50000	10.5
542803	VEL	VARSHA VAIBHAV PATIL	B	50000	10.5
531015	VENMAX	SAMTA POLYMERS LTD	B	45180	19.31
531337	WINPRO	DILKUSH BAFNA J	S	793581	4.32
531337	WINPRO	GAJANAND JASHWANTBHAI TAILOR	B	1145000	4.26
531337	WINPRO	JIGAR M BHANUSHALI	B	658700	4.32

ANNAPURNA	Annapurna Swadisht Ltd	EXCEL STOCK BROKING PRIVATE LIMITED	BUY	125000	412.16
ANYA	Any a Poly tech & Ferti Ltd	KN FAMILY TRUST	BUY	680000	17.1
ANYA	Any a Poly tech & Ferti Ltd	VINEY EQUITY MARKET LLP	BUY	1000000	17.1
COMMITTED	Committed Cargo Care Ltd	ABHISHEK STERLING HOLDING PROPRIETOR ABHISHEK JINDAL	BUY	56000	141.25
DHANLAXMI	Dhanlax mi Crop Science L	JITENDRA KAPURCHAND PARMAR	BUY	90000	68.81
HPIL	Hindprakash Industry Ltd	CHEMHUB TRADELINK PRIVATE LIMITED	BUY	83000	157.33
KANDARP	Kandarp Dg Smart Bpo Ltd	RASHMI RATILAL MEHTA	BUY	72000	48
KANDARP	Kandarp Dg Smart Bpo Ltd	RELIABLE DATA SERVICES LIMITED	SELL	160000	48.11
NMSTEEL	New malay alam Steel Ltd	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	200000	69.7
ONYX	Ony x Biotec Limited	MARWADI SHARES AND FINANCE LTD.	BUY	92000	93.24
SIKKO-RE	Sikko Industries Ltd	JAYANTIBHAI MOHANBHAI KUMBHANI	SELL	154194	0.46
SOTAC	Sotac Pharmaceuticals Ltd	SANDHYA SINGH GAHLAUT	SELL	99600	116.3

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Nirmal Bang Research (Division of Nirmal Bang Securities Pvt. Ltd.)

B-2, 301/302, Marathon Innova,
Opp. Peninsula Corporate Park
Off. Ganpatrao Kadam Marg
Lower Parel(W), Mumbai-400013
Board No. : 91 22 6723 8000/8001
Fax. : 022 6723 8010