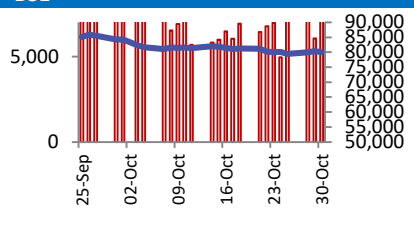
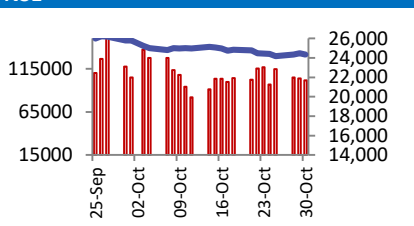


BSE		NSE																													
	<table border="1"> <tr><td>Open</td><td>80238</td></tr> <tr><td>High</td><td>80436</td></tr> <tr><td>Low</td><td>79822</td></tr> <tr><td>Close</td><td>79942</td></tr> <tr><td>Change</td><td>-427</td></tr> <tr><td>Volume (Lacs)</td><td>6482</td></tr> <tr><td>Turnover (Rs.inCr)</td><td>8760</td></tr> </table>	Open	80238	High	80436	Low	79822	Close	79942	Change	-427	Volume (Lacs)	6482	Turnover (Rs.inCr)	8760		<table border="1"> <tr><td>Open</td><td>24371</td></tr> <tr><td>High</td><td>24498</td></tr> <tr><td>Low</td><td>24307</td></tr> <tr><td>Close</td><td>24341</td></tr> <tr><td>Change</td><td>-126</td></tr> <tr><td>Volume(Lacs)</td><td>38863</td></tr> <tr><td>Turnover(Rs.in Cr)</td><td>101467</td></tr> </table>	Open	24371	High	24498	Low	24307	Close	24341	Change	-126	Volume(Lacs)	38863	Turnover(Rs.in Cr)	101467
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World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	42142	42233	(92)	-0.2%
Dow Futures	42315	42363	(48)	-0.1%
Nasdaq	18608	18713	(105)	-0.6%
FTSE	8160	8220	(60)	-0.7%
Nikkei	39117	39277	(161)	-0.4%
Hang Seng	20461	20381	80	0.4%
Gift Nifty	24264	24306	(42)	-0.2%
Straits Singapore	3559	3559	Closed	Closed
South Korea	2570	2594	(24)	-0.9%
Taiwan	22820	22927	(106)	-0.5%
Shanghai	3294	3266	28	0.9%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9538	9531	7.5	0.1%
Alumin (\$/MT)	2616	2659	(43.0)	-1.6%
Zinc (\$/MT)	3087	3122	(35.5)	-1.1%
Brent Crude (\$/bbl)	72.9	72.6	0.3	0.5%
Gold (\$/Ounce)	2787	2788	(0.8)	0.0%
Silver (\$/Ounce)	33.7	33.8	(0.1)	-0.3%
Light Crude (\$/bbl)	68.9	68.6	0.3	0.4%
N G (\$/mmbtu)	2.8	2.8	(0.0)	-0.7%
Sugar (\$/MT)	576.9	571.5	5.4	0.9%
Rubber (Rs./kg)	181.0	181.0	0.0	0.0%
Baltic Dry Index	1395	1402	(7.0)	-0.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	84.09	84.08	0.01%
Rs./ Euro	91.16	90.96	0.21%
Rs./Chinese Yuan	11.81	11.82	-0.11%
Yen / \$ rate	153.36	153.42	-0.04%
\$ US/Euro	1.08	1.09	-0.07%

Dollar Index	Current	Previous	Var(%)
Dollar Index	105.26	105.28	-0.02%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	24250	51540
Support 2	24160	51300
Resistance	24430	52000

Securities in Ban For Trade	
PNB	INDIAMART
RBLBANK	IDFCFIRSTB

### Market Review

**US:** US Stocks slipped on Wednesday as investors digested a deluge of earnings reports and looked toward more results from megacap technology companies.

**Asia:** Markets slipped Thursday as investors look to the Bank of Japan's rate decision, as well as key business activity figures from China.

**India:** The Indian market slipped in the red on Wednesday after giving a positive close for the past 2 trading sessions. The BSE Sensex fell more than 400 points while the Nifty50 closed below 24,400 levels. **Market is expected to open on a gap down note and likely to witness range bound move during the day.**

**Global Economy:** Japan's factory output increased by 1.4% month-on-month, surpassing the median market forecast of 1%. This data was released by the Ministry of Economy, Trade and Industry. Looking ahead, manufacturers anticipate a significant rise in output of 8.3% for October, followed by a projected decline of 3.7% in November. Additionally, Japanese retail sales rose by 0.5% year-on-year in September, falling short of the expected 2.3% increase.

China's non-manufacturing activity showed signs of recovery, with the official non-manufacturing PMI rising to 50.2, up from 50.0 in Sep. This slight increase indicates a return to expansion, as the 50-point threshold separates growth from contraction. Additionally, the composite PMI, which combines both manufacturing and services sectors, reached 50.8 for the month. This data provides some relief to Chinese policymakers amid ongoing concerns about the overall economic recovery in the economy.

**Commodities:** Oil prices rose on Thursday, extending the previous day's rally, driven by optimism over U.S. fuel demand following an unexpected drop in crude and gasoline inventories, while reports that OPEC+ may delay a planned output increase offered support.

Gold climbed to a record, boosted by haven demand before the US election and shrugging off data that could influence the size of Federal Reserve rate cuts this year.

**Currency:** The yen remained under pressure on Thursday as the Bank of Japan looked set to keep ultra-low interest rates steady, while the U.S. dollar paused ahead of jobs data later this week and the U.S. presidential election next week.

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	90189	5995	108663	7460	(1465)	425324	27894	459461	30475	(34137)	(2581)
Index Option	54034508	4009486	54519147	4044550	(35064)	7450259	469701	8797502	590261	(1347243)	(120560)
Stock Future	1229297	93604	1236328	95359	(1755)	4527412	340621	4578675	344695	(51263)	(4074)
Stock Option	684123	52630	690807	53462	(832)	1273948	95527	1300712	97919	(26764)	(2392)
<b>Total</b>	<b>56038117</b>	<b>4161715</b>	<b>56554945</b>	<b>4200831</b>	<b>(39116)</b>	<b>13676943</b>	<b>933743</b>	<b>15136350</b>	<b>1063350</b>	<b>(1459407)</b>	<b>(129607)</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
23-Oct-24	15648	20639	(4991)
24-Oct-24	12923	17760	(4837)
25-Oct-24	15578	18606	(3027)
28-Oct-24	14100	16209	(2109)
29-Oct-24	15839	16732	(893)
<b>Month to date- Oct</b>	<b>287804</b>	<b>373196</b>	<b>(85393)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
24-Oct-24	12537	17600	(5062)
25-Oct-24	14210	17247	(3037)
28-Oct-24	13393	16621	(3228)
29-Oct-24	15509	16057	(549)
30-Oct-24	14909	19522	(4614)
<b>Month to date-Oct</b>	<b>282627</b>	<b>391259</b>	<b>(108633)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
24-Oct-24	13828	10207	3620
25-Oct-24	15203	11044	4159
28-Oct-24	12258	10857	1401
29-Oct-24	12824	12094	730
30-Oct-24	13594	9076	4518
<b>Month to date-Oct</b>	<b>327159</b>	<b>223419</b>	<b>103740</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
23-Oct-24	714	1929	(1216)
24-Oct-24	1872	2770	(899)
25-Oct-24	2041	591	1450
28-Oct-24	1271	2774	(1504)
29-Oct-24	3599	2254	1345
<b>Month to date- Oct</b>	<b>45623</b>	<b>51608</b>	<b>(5985)</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2857	71%	2062	74%
Decline	1075	27%	685	24%
Unchanged	79	2%	52	2%

Market Turnover	30-Oct	29-Oct	Var (%)
BSE Cash	8760	6062	45%
NSE Cash	101467	103953	-2%
NSE Futures	321995	392688	-18%
NSE Options	58209440	46451015	25%
Total (Rs.Cr)	58641662	46953718	25%

Volatility Index	30-Oct	29-Oct
Volatility Index	15.51	14.52

Index PE - TTM	30-Oct	Yr. High	Yr. Low
Sensex	23.2	26.0	21.8
Nifty	22.9	28.8	20.3

Corporate News

**Two Adani firms sign pacts with MSEDCCL to supply 6,500 MW power**

Adani Green Energy and Adani Transmission, have signed agreements with MSEDCCL to supply a total of 6,500 MW of power. This collaboration aims to enhance the renewable energy supply in Maharashtra and is part of a broader strategy to meet the state's growing energy demands. The agreements are expected to support MSEDCCL's efforts in transitioning to cleaner energy sources while ensuring reliable power availability for consumers. (ET)

**ZyduS Wellness to Acquire Naturell India, Enter Healthy Snacking Market**

ZyduS Wellness to acquire Naturell India, a move aimed at expanding its portfolio into the healthy snacking segment. This acquisition is part of ZyduS's strategy to diversify its offerings and tap into the growing demand for nutritious snack options in India. Naturell India is known for its range of health-focused products, and this deal will enhance ZyduS's presence in the wellness market. (ET)

**Jupiter Wagons Acquires Log9's Railway and Electric Truck Battery Divisions**

Jupiter Electric Mobility has acquired the railway and electric truck battery divisions of Log9 Materials. This strategic move aims to enhance Jupiter's capabilities in the electric vehicle sector, particularly in developing advanced battery technologies for its commercial electric vehicles. (FE)

Economy

**Fiscal deficit in 1st Half of FY25 drops to 29.4% of annual target**

The central gov't's fiscal deficit in the first half of 2024-25 touched 29.4% of the annual target, compared with 39.3% a year before, as it kept a lid on expenditure. (ET)

**Paddy procurement on track in Haryana, Punjab**

Haryana and Punjab are progressing well in their paddy procurement for the 2024-25 kharif season, with 112 lakh tonnes purchased so far. Despite a delayed start due to rains, procurement is active, and farmers are receiving prompt payments via direct bank transfers. (ET)

International

**Toyota supplier Denso cuts full-year profit forecast by 21%**

Denso, a major Toyota supplier, has cut its full-year profit forecast by 21% to \$3.8 bn due to declining demand for automotive components and increased competition from China. The company reported a 14.5% drop in 2nd-quarter operating profit to 138.6 bn yen, citing lower vehicle production and rising costs. Denso plans to focus on electric vehicle components to enhance competitiveness amid these challenges. (ET)

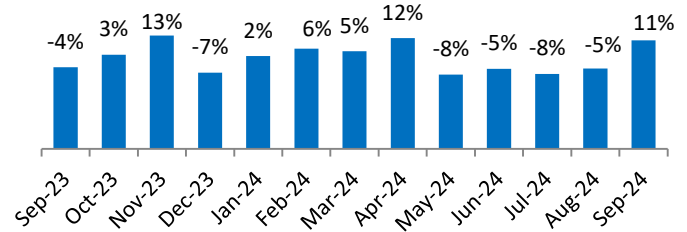
Top 5 Nifty Gainers	30-Oct	29-Oct	Var(%)
ADANIENT	2969	2849	4.2%
TATACONSUM	1023	992	3.1%
HEROMOTOCO	4909	4787	2.5%
BRITANNIA	5783	5668	2.0%
MARUTI	11256	11046	1.9%
Top 5 Nifty Losers	30-Oct	29-Oct	Var(%)
CIPLA	1418	1478	-4.0%
SHRIRAMFIN	3186	3266	-2.4%
SBILIFE	1624	1661	-2.2%
HDFCLIFE	727	742	-2.1%
INFY	1802	1839	-2.0%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	79942	-0.5%	-0.2%	-5.2%	25.2%
MIDCAP	46121	0.0%	-0.2%	-6.5%	47.6%
SMLCAP	54108	1.5%	0.1%	-5.3%	46.6%
AUTO	53687	-0.1%	-3.4%	-12.1%	48.4%
BANKEKX	59050	-1.0%	1.5%	-1.6%	21.9%
Capital Goods	67660	0.6%	-0.4%	-7.5%	47.8%
FMCG	21783	0.9%	-0.4%	-8.4%	17.6%
Health Care	43115	-0.2%	0.9%	-2.5%	58.1%
IT	41486	-0.7%	-1.7%	-2.1%	33.6%
METAL	31268	-0.3%	-1.1%	-9.7%	40.6%
Oil & Gas	27461	-0.6%	-3.1%	-13.7%	50.6%
Power	7816	-0.5%	-0.7%	-9.7%	76.4%
Realty	7826	-0.1%	0.4%	-8.9%	63.8%

NSE USD Futures	30-Oct	29-Oct	Var (%)
Oct Expiry (Rs./\$)	81.31	84.08	-3.3%
Nov Expiry (Rs./\$)	84.19	81.31	3.5%
Total Turnover (Rs. Crore)	1467	6003	-76%

Sectors	TTM PE
Auto	30.78
Auto Ancillary	51.58
Banking	14.08
Engineering	43.7
Cement	78.56
Diamonds & Jewellery	48.96
Housing Finance	25.88
Infrastructure & Const	33.45
Metals-Aluminium	34.04
Metal – Steel	19.44
Oil Expl.	17.34
Pharma	10.4
Power – Gen. Supp.	45.09
Information Tech.	26.29
Sugar	21.18
Telecom Serv. Prov.	82.75
Tyres	26.51

**Royal Enfield: Monthly Sales Volume Growth (YoY)**  
(Source: Company Data)



10 year G-Sec Yield	Current	Previous	Change
<b>US</b>	4.29%	4.30%	(1) bps
<b>Japan</b>	0.96%	0.96%	(0) bps
<b>India</b>	6.83%	6.86%	(3) bps
<b>UK</b>	4.35%	4.32%	4 bps
<b>Libor 3 Mths</b>	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	654	652	0.3%
Inflation - WPI	1.84%	1.31%	53 bps
Inflation - CPI	5.49%	3.65%	184 bps

India GDP	Q1FY25	Q4FY24	Var(%)
Growth	6.70%	7.76%	(106)bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.50%	6.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.50%	4.50%	0 bps
O/S Banking System Liquidity (Rs bn)	1078	819	259.1

IIP Growth %	Aug-24	Aug-23	Apr-Feb
IIP	-0.1	10.9	4.3
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 30/10/24**

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539773	ADVIKCA	SYLPH TECHNOLOGIES LIMITED	S	3859914	2.35
526443	AEIM	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	14705	291.8
526443	AEIM	PACE STOCK BROKING SERVICES PVT LTD	S	6788	291.8
526443	AEIM	ZULFI RAVDJEE	S	6000	291.8
538465	AMARSEC	AMIT RAMANLAL LODHA	B	25000	30
538465	AMARSEC	DILIP KESHRIKAL SANKLECHA	S	30024	30
541006	ANGEL	JAIN FINSCAP PRIVATE LIMI TED	B	132000	21.92
541006	ANGEL	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	S	180000	21.57
524434	ASINPET	KAILASHBEN ASHOKKUMAR PATEL	S	49509	15.11
532380	BABA	NAMAN SECURITIES & FINANCE PVT. LTD.	S	332223	19.53
532380	BABA	NAMAN SECURITIES & FINANCE PVT. LTD.	B	337223	19.55
530825	DAIKAFFI	WORLD FOODS LLP	B	40900	244.5
539884	DARSHANORNA	NIRAJ RAJNIKANT SHAH	B	450000	5.07
539884	DARSHANORNA	SALIM MOHAMMED HUSSEIN PUNJANI	S	950000	5.07
539884	DARSHANORNA	SUSHILA	S	136789	5.07
539884	DARSHANORNA	SUSHILA	B	262789	5.06
543516	DHYAANITR	ANILBHASKARREDDYPASAM	B	159600	13.95
540936	GGL	SHUBHAM KUMAR	S	76205	6.73
540936	GGL	SHUBHAM KUMAR	B	260205	6.76
540266	GLCL	JAINAM UDAY SHAH	B	32308	40.57
513337	GUJTLRM	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	1100000	12.18
513337	GUJTLRM	SHUBHAM ASHOKBHAI PATEL	S	1313935	12.18
505336	HARSHILAGR	VISHAL SHAH	S	1280532	11.71
523373	MINID	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	19712	214.54
532140	MOHITE	VISHWANATH MINERALS AND METALS LLP	S	279001	148.29
532140	MOHITE	VISHWANATH MINERALS AND METALS LLP	B	34685	148.28
531494	NAVVAR	MOONLIGHT MULTITRADE LLP	S	1500000	10.91
531494	NAVVAR	SIDDHANT SHIRISH SHAH	S	1443684	10.44
519479	OMEAG	GREEN PEAKS ENTERPRISES LLP	B	50000	17.19
519479	OMEAG	VISWA PRASAD SADHANALA	S	50000	17.19
531157	ORCOAT	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	43824	28.23
540198	OSIAJEE	ANAND KUMAR YADAV	S	28240	50.91
540198	OSIAJEE	ANAND KUMAR YADAV	S	45990	50.93
540198	OSIAJEE	NIVL ADVISORS PRIVATE LIMITED	S	37841	51.22
540198	OSIAJEE	NIVL IT SERVICES PRIVATE LIMITED	B	97829	50.99
536659	PVVINFRA	ABDURRAHMAN MOHD SHAFI TAIBANI	S	489001	5.09
536659	PVVINFRA	ABDURRAHMAN MOHD SHAFI TAIBANI	B	11947	5.02
541601	RAJNISH	NIRAJ RAJNIKANT SHAH	S	8526793	2.18
541601	RAJNISH	SHUBHAM ASHOKBHAI PATEL	B	10000000	2.18
543515	SEML	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	78000	101.79
512589	SITAENT	SUMAN DEVI BAGARIA	S	30000	70.27
543924	SONALIS	SANDIPBHARATSOLANKI	S	16000	99.42
539217	SRESTHA	PEARL DEALERS PRIVATE LIMITED	S	22876682	0.62
540914	SRUSTEELS	7M DEVELOPERS LLP	S	308150	6.36
540914	SRUSTEELS	SYLPH TECHNOLOGIES LIMITED	S	154044	6.19
540914	SRUSTEELS	SYLPH TECHNOLOGIES LIMITED	B	489700	6.37
543745	SVS	ABDUL AHAD SHAKEEL MISTRY	S	432000	12.55
543745	SVS	BIDRAKOTE SHIVALINGE GOWDA BINDU	B	594000	12.53
543745	SVS	CHIMANSHU	S	126000	12.55
543745	SVS	CHIMANSHU	B	150000	12.72

543745	SVS	CONSOLIDATED SPECIALITY SERVICES PRIVATE LIMITED	B	204000	12.54
543745	SVS	HI GROWTH CORPORATE SERVICES PVT LTD	S	144000	12.54
543745	SVS	HI GROWTH CORPORATE SERVICES PVT LTD	B	12000	12.41
543745	SVS	JINESHKUMAR POPATLAL SHAH	S	108000	12.5
543745	SVS	YELLOWSTONE VENTURES LLP	S	180000	12.82
539985	TITAANIUM	RISHI CREDIT & INDUSTRIES PRIVATE LIMITED	B	60000	60.25
500420	TORNTPHARM	TORRENT INVESTMENTS PRIVATE LIMITED	S	4972020	3104.4
500420	TORNTPHARM	TORRENT INVESTMENTS PRIVATE LIMITED	S	4972020	3103.07
531279	TRISHAKT	HEMANT NARESH JAIN HUF	S	100000	117.8
531279	TRISHAKT	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	100000	117.8
531279	TRISHAKT	SHALINI JHANWAR	B	81000	123.12
530057	VIVANZA	PARTH HEMANT PARIKH	S	281423	3.76

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AKSHAR	Akshar Spintex Limited	CHANDAN CHAURASIYA	SELL	22922630	0.73
AKSHAR	Akshar Spintex Limited	HITESH SINGH	SELL	4476164	0.73
ATALREAL	Atal Realtch Limited	MANISH NITIN THAKUR	SELL	891337	11.5
FONEBOX	Fonebox Retail Limited	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	SELL	87000	154.3
GODAVARIB	Godavari Biorefineries L	CAPRI GLOBAL CAPITAL LIMITED	SELL	374382	327.98
GODAVARIB	Godavari Biorefineries L	MADHURI MADHUSUDAN KELA	BUY	500000	335.66
JYOTISTRUC	Jyoti Structures Ltd	AION JYOTI LLC	SELL	5639693	36.44
LAKSHYA	Lakshya Powertech Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	176800	307.08
LAKSHYA	Lakshya Powertech Limited	ROHAN GUPTA	BUY	57600	299.91
MACOBSTECH	Macobs Technologies Ltd	VASANT BALIRAMPANT BELORKAR	BUY	62400	125.73
SATECH	S A Tech Software India L	ASHIKA GLOBAL SECURITIES PRIVATE LIMITED	SELL	86000	122.48
SECURCRED	SecUR Credentials Limited	NAZIYA AMIN NAYANI	BUY	230000	3.34
SHRITECH	Shri Techtex Limited	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	SELL	204000	62.94
SKIPPERPP	Skipper Limited	ASHLA VENTURES LLP	BUY	98406	359.47
SKIPPERPP	Skipper Limited	RISHABH STOCKS PRIVATE LIMITED RISHABH	SELL	64100	358.83
SLONE	Slone Infosystems Limited	ROHAN SUDHAKAR JADHAV	SELL	30400	159.73
SSFL	Srivari Spices N Foods L	ISHAAN TRADEFIN LLP	SELL	78500	204.79
UHTL	United Heat Transfer Ltd	ASHWIN STOCKS AND INVESTMENT PRIVATE LIMITED	BUY	120000	66.52
UHTL	United Heat Transfer Ltd	MANSI SHARE AND STOCK ADVISORS PVT LTD	SELL	200000	67.1

**Disclosure:**

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