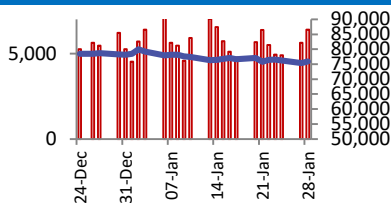
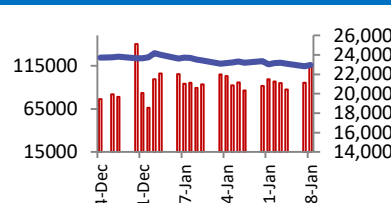


BSE



Open	75659
High	76513
Low	75623
Close	75901
Change	535
Volume (Lacs)	5922
Turnover (Rs.inCr)	6401

NSE



Open	22960
High	23138
Low	22858
Close	22957
Change	128
Volume(Lacs)	37670
Turnover(Rs.in Cr)	115503

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44850	44714	137	0.3%
Dow Futures	45019	45031	(12)	0.0%
Nasdaq	19734	19342	392	2.0%
FTSE	8534	8504	30	0.4%
Nikkei	39233	39017	216	0.6%
Hang Seng	20225	20225	Closed	Closed
Gift Nifty	23022	23058	(37)	-0.2%
Straits Singapore	3801	3801	Closed	Closed
South Korea	2537	2537	Closed	Closed
Taiwan	23525	23525	Closed	Closed
Shanghai	3251	3251	Closed	Closed

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9002	8987	15	0.2%
Alumin (\$/MT)	2567	2573	(6)	-0.2%
Zinc (\$/MT)	2771	2775	(4)	-0.1%
Brent Crude (\$/bbl)	77	77	(0)	-0.1%
Gold (\$/Ounce)	2765	2764	2	0.1%
Silver (\$/Ounce)	30	30	0	0.2%
Light Crude (\$/bbl)	74	74	(0)	0.0%
N G (\$/mmbtu)	3	3	(0)	-2.9%
Sugar (\$/MT)	512	507	5	0.9%
Rubber (Rs./kg)	191	191	1	0.3%
Baltic Dry Index	746	761	(15)	-2.0%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	86.53	86.34	0.22%
Rs./ Euro	90.31	90.56	-0.28%
Rs./Chinese Yuan	11.89	11.91	-0.10%
Yen /\$ rate	155.62	155.54	0.05%
\$ US/Euro	1.04	1.04	0.04%

Dollar Index	Current	Previous	Var(%)
Dollar Index	107.88	107.87	0.01%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22870	48540
Support 2	22800	48200
Resistance	23040	49000

Securities in Ban For Trade
NIL

Market Review

US: US stock indices edged higher on Tuesday after previous session's sharp losses amid a tech-led selloff.

Asia: Asian shares rose Wednesday morning to follow Wall Street's tech-led rebound from a selloff that shook global markets, as focus turns to the Federal Reserve's rate decision and US mega-cap earnings.

India: The benchmark equity indices settled in positive territory on Tuesday as the banking stocks stole the show in the sectorial markets, with Nifty Bank, PSB, and private bank indices each ending higher by over 1 per cent. **Market is expected to open on a positive note and likely to witness range bound move during the day.**

Global economy: Australian consumer price index inflation grew slightly less than expected in the fourth quarter, while underlying inflation also eased but still remained above the Reserve Bank of Australia's target range. CPI grew 2.4% year-on-year in Q4, its slowest pace since early 2021, data from the Australian Bureau of Statistics showed on Wednesday.

The American Petroleum Institute has reported a rise in the inventory levels of US crude oil, gasoline, and distillate stocks. The actual increase in crude inventories was 2.860 million barrels, a figure that provides an overview of US petroleum demand. This increase, while significant, was less than the forecasted rise of 3.700 million barrels.

Commodities: Oil prices steadied on Wednesday as investors weighed the impact of potential U.S. tariffs on Canadian and Mexican imports, while largely shrugging off an increase in U.S. weekly crude inventory.

Gold prices were stable on Wednesday, recovering slightly after a tech-driven market selloff, as uncertainty over U.S. tariffs spurred safe-haven demand, while focus shifted to the Federal Reserve's meeting conclusion due later in the day.

Currency: The US dollar rose, rebounding after the previous session's losses in the wake of a selloff in technology stocks, on heightened concerns about trade wars and their impact on global growth.

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	133918	10421	99404	10910	(489)	471680	45391	497816	41982	(26136)	3409
Index Option	18839677	1214017	18701092	1209795	4222	7611225	558731	7171704	514753	439521	43978
Stock Future	2333918	140055	2292041	137539	2516	5802695	348497	5727346	341760	75349	6737
Stock Option	2074045	130961	2071126	130735	226	1970156	116487	1931285	114478	38871	2009
Total	23381558	1495454	23163663	1488979	6475	15855756	1069106	15328151	1012973	527605	56133

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
21-Jan-25	10393	16721	(6328)
22-Jan-25	14400	17418	(3018)
23-Jan-25	15800	18861	(3061)
24-Jan-25	11537	14403	(2866)
27-Jan-25	10440	14955	(4514)
Month to date- Jan	214992	281177	(66185)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
22-Jan-25	12937	16963	(4026)
23-Jan-25	13317	18779	(5463)
24-Jan-25	11230	13989	(2758)
27-Jan-25	9489	14504	(5015)
28-Jan-25	11166	16087	(4921)
Month to date-Jan	210541	289558	(79016)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
22-Jan-25	15437	11797	3640
23-Jan-25	14413	10700	3713
24-Jan-25	12835	10433	2402
27-Jan-25	16503	9861	6642
28-Jan-25	19735	12921	6814
Month to date-Jan	299334	218933	80401
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
21-Jan-25	933	776	157
22-Jan-25	3272	1621	1651
23-Jan-25	1439	933	506
24-Jan-25	1249	1528	(279)
27-Jan-25	4163	1510	2653
Month to date- Jan	37218	37465	(246)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1308	32%	840	29%
Decline	2666	65%	2005	69%
Unchanged	110	3%	50	2%

Market Turnover	28-Jan	27-Jan	Var (%)
BSE Cash	6401	5637	14%
NSE Cash	115503	95151	21%
NSE Futures	386103	313468	23%
NSE Options	13477994	10995991	23%
Total (Rs.Cr)	13986001	11410247	23%

Volatility Index	28-Jan	27-Jan
Volatility Index	18.20	18.13

Index PE - TTM	28-Jan	Yr. High	Yr. Low
Sensex	21.6	25.7	21.5
Nifty	20.9	24.4	20.8

Corporate News

UltraTech in advanced talks to acquire Heidelberg Cement

UltraTech Cement is in advanced discussions to acquire the Indian operations of Heidelberg Cement, according to sources. The deal could involve Heidelberg Materials Group's 69.39 % stake in Heidelberg Cement India Ltd, valued at around Rs 3,381 cr based on the Jan 24 closing price. (BS)

JSW group forays into copper mining business

JSW group announced its entry into the copper business, with the winning of a Mine Operator and Developer (MDO) contract for two mining blocks in Jharkhand. The group said it will invest Rs 2,600 cr in the business. Won through a competitive bidding process, the project involves operationalising the two mines and setting up of a copper concentrator plant. (BS)

Wipro bags Transformational deal

FrieslandCampina has selected Wipro to manage its core IT services for a period of five and a half years. (HL)

Tata Powers arm bags Rs 455 crore project

Tata Power's solar manufacturing arm, TP Solar, secured a Rs 455 cr contract to supply 300 MWp ALMM modules to Maharashtra State Power Generation Company Limited.

Economy

RBI announces measures to manage liquidity conditions

RBI to conduct operations to inject liquidity into the banking system that include OMO purchase auctions of ₹60,000 cr in 3 tranches (Jan 30, Feb 13, and Feb 20, 2025), a 56-day Variable Rate Repo auction for ₹50,000 cr on Feb 7, 2025, and a USD/INR Buy/Sell Swap auction of USD 5 bn on Jan 31, 2025. (ET)

FM pushes PSBs to boost affordable insurance coverage

The Union finance ministry has asked public-sector banks to intensify expanding the coverage of govt-backed affordable life insurance schemes under its financial-inclusion initiative. Under the PMJJBY, the enrolment target for all banks was 40.74 mn and 20.78 mn were brought under it, resulting in an achievement rate of 51% till Dec 2024. (ET)

International

Trump confirms Microsoft in talks over TikTok acquisition

Donald Trump confirmed that Microsoft was in talks over buying TikTok, and that he wanted to see a bidding war to keep the social media app in the U.S. Trump had earlier told reporters that he was in talks with multiple parties over TikTok's future, and that he expected to reach a deal within 30 to 90 days. (Inv)

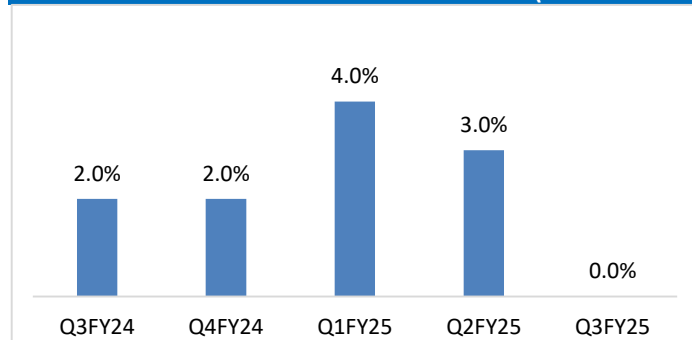
Top 5 Nifty Gainers	28-Jan	27-Jan	Var(%)
BAJFINANCE	7607	7295	4.3%
AXISBANK	984	948	3.8%
SHRIRAMFIN	530	512	3.6%
BAJAJFINSV	1769	1712	3.4%
HDFCBANK	1670	1630	2.5%
Top 5 Nifty Losers	28-Jan	27-Jan	Var(%)
SUNPHARMA	1706	1787	-4.6%
BRITANNIA	5061	5176	-2.2%
HINDALCO	574	587	-2.2%
GRASIM	2411	2458	-1.9%
BEL	258	263	-1.8%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	75901	0.7%	0.1%	-3.6%	5.5%
MIDCAP	41319	-0.6%	-4.3%	-10.8%	7.7%
SMLCAP	47492	-1.8%	-8.2%	-13.7%	6.0%
AUTO	50050	1.2%	-0.7%	-4.2%	15.6%
BANKEKX	55516	1.5%	0.9%	-4.6%	7.9%
Capital Goods	60136	-1.6%	-6.6%	-11.8%	3.5%
FMCG	20102	-0.4%	-0.8%	-2.6%	0.9%
Health Care	40264	-1.9%	-5.4%	-9.8%	21.6%
IT	40976	-0.8%	-0.9%	-6.0%	10.3%
METAL	27534	-0.6%	-4.0%	-5.7%	3.7%
Oil & Gas	24377	-0.8%	-6.7%	-5.7%	-5.8%
Power	6220	-1.5%	-5.9%	-11.0%	-1.5%
Realty	6684	1.3%	-6.2%	-20.0%	1.4%

NSE USD Futures	28-Jan	27-Jan	Var (%)
Jan Expiry (Rs./\$)	86.58	86.31	0.3%
Feb Expiry (Rs./\$)	84.91	84.91	0.0%
Total Turnover (Rs. Crore)	17698	15927	11%

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

Hindustan Unilever Ltd Volume Growth (Source: NBRR)



10 year G-Sec Yield	Current	Previous	Change
US	4.52%	4.53%	(1) bps
Japan	1.20%	1.20%	0 bps
India	6.69%	6.68%	1 bps
UK	4.61%	4.59%	3 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)	-2925	-2981	55.6

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	21.53	14719335	21.54	9588947	-0.05%	1	1863.02	1829.75	1.8%
Wipro	3.65	8966445	3.66	6803352	-0.27%	1	315.84	303.60	4.0%
Dr.Reddy's	13.53	1697496	13.65	1873597	-0.88%	1	1170.77	1181.25	-0.9%
ICICI Bank	28.86	3961946	28.34	5937788	1.83%	2	1248.65	1246.90	0.1%
HDFC Bank	60.34	2407659	58.72	2902968	2.76%	3	1740.43	1670.40	4.2%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	39.40	40.00	(0.6)	-1.5%
RIL	57.00	57.20	(0.2)	-0.3%
SBI	86.70	86.30	0.4	0.5%

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
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
Gothi Plascon (India) Ltd.	01/02/25	Interim Dividend
Route Mobile Ltd.	01/02/25	Second Interim Dividend
Torrent Pharmaceuticals Ltd.	01/02/25	Interim Dividend

Bulk Deal As On 28/01/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
511463	ALEXANDER	TEJESH HASMUKH SHAH	S	50000	13.36
543439	BRANDBUCKT	RAVINDRA DHONDU DHURI	S	132000	10.83
512443	GANONPRO	NITIN SANJANA	S	74400	8.2
512443	GANONPRO	SAGAR ASHOK DHEKANE	B	46701	8.2
513309	GOLKONDA	AVANI RONAK KENIYA	S	29137	10.47
531913	GOPAIST	ANJALIMEHRA	B	26350	7.63
540938	GUJHYSPI	BHAVIKA DHIRAJLAL CHAVDA	S	110000	22.03
513337	GUJTLRM	NORTH STAR OPPORTUNITIES FUND VCC-BULL VALUE INCORPORATED VCC SUB-FUND	S	3981202	11.26
532745	INDICAP	AJAY GOPAL GUPTA	S	197338	9.5
532745	INDICAP	SHALINI GUPTA	B	197338	9.5
538765	JSHL	AMISHA YADAV	S	90000	7.91
538765	JSHL	ARUN GUPTA	B	40000	8.6
538765	JSHL	KHUSHBOO R SHAH	B	75000	8.71
538765	JSHL	MANOJ KUMAR KANDA	B	150000	8.73
538765	JSHL	PRAVEEN ARORA	S	75000	8.73
538765	JSHL	SHASHI GUPTA	S	155000	8.7
538765	JSHL	SHIPRABATHLA	B	55000	8.09
538765	JSHL	SUBHADRA RAMESHCHANDRA SHAH	S	80000	8.7
531784	KCLINFRA	JIGNESH AMRUTLAL THOBHANI	S	4800968	1.43
531784	KCLINFRA	SAPPERS INFRA REALTORS PRIVATE LIMITED	B	4799920	1.43
531402	LWSKNIT	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	187248	18.62
531402	LWSKNIT	NEO APEX VENTURE LLP	S	177524	18.62
544313	NACDAC	AL MAHA INVESTMENT FUND PCC-ONYX STRATEGY	S	80000	61.51
519528	NORBTEAEXP	SHAH DIPAK KANAYALAL	S	70000	24.06
512489	OASISEC	ADVANTAGE OVERSEAS PRIVATE LIMITED	S	32786	240.45
512489	OASISEC	GUTTIKONDA RAJASEKHAR	S	18806	240.45
512489	OASISEC	GUTTIKONDA VARA LAKSHMI	S	13203	240.45
512489	OASISEC	VISHESH TONY JATIAA	B	20000	240.45
530805	OIVL	PARESH GUNVANTBHAI PATEL	B	200000	11.04
511644	OMEGAIN	KAILASH CHAND SINGHI	S	30000	239.63
511644	OMEGAIN	TEENA KIRTI JAIN	B	8247	241.04
511644	OMEGAIN	TEENA KIRTI JAIN	B	27600	239.47
511644	OMEGAIN	VIHA ASHOK JAIN	B	4638	239.43
539287	ORTINGLOBE	BEACON STONE CAPITAL VCC - BEACON STONE I	S	100000	15.44
539287	ORTINGLOBE	WAVE CAPITAL LTD	B	100000	15.44
540404	PRIMEFRESH	TRINA DEVANG VYAS	B	78750	175.13
511557	PROFINC	RAJESH PAILA	S	2468595	4.77
530797	SHGANEL	GIRISH VAGHAJIBHAI SOLANKI	B	60000	27
540072	SHIVAEXPO	REX PIPES AND CABLES INDUSTRIES LIMITED	S	70000	24.56
531205	SPRIGHT	TRANSPAACIFIC SHIPPING AND RESOURCES PRIVATE LIMITED	S	9665646	7.74
544267	SUBAM	G GUNAVANTH KUMAR	B	120000	104.86

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AMJUMBO	A and M Jumbo Bags Ltd	JYOTSNABEN DINESHBHAI PATEL	SELL	64000	9.44
CALSOFT-RE	California Soft Ltd	SASIKUMAR CHITHRA	BUY	308587	1.05
CALSOFT-RE	California Soft Ltd	SUBASHINI	BUY	860000	1.45
GLOBE-RE1	Globe Tex tiles Ltd	RAGHAV KAROL HUF	BUY	900298	0.41
KKJEWELS	Kabra Jewels Limited	MANSI SHARE AND STOCK ADVISORS PVT LTD	SELL	126000	213.1
KKJEWELS	Kabra Jewels Limited	NEO APEX VENTURE LLP	SELL	75000	213.1
KKJEWELS	Kabra Jewels Limited	VINOD KUMAR	BUY	150000	213.1
MOBIKWIK	One Mobikwik Systems Ltd	SARAVANA SECURITIES D.SATHYAMOORTHY	BUY	600000	406.64
OLIL	Oneclick Logistics Ind L	DARSHIT GIRISHBHAI PATEL	BUY	42000	120.75
OLIL	Oneclick Logistics Ind L	GIRIRAJ STOCK BROKING PRIVATE LIMITED	SELL	26400	120.82
ORIENTALTL	Oriental Trimex Limited	NEO APEX VENTURE LLP	SELL	399992	9.86
SHANTI	Shanti Overseas (Ind) Ltd	MANISH KUMAR HUF	SELL	183463	13.45
USHAFIN	Usha Financial Services L	UNINAV DEVELOPERS PVT LTD	BUY	154400	102.6
UTSSAV	Utssav CZ Gold Jewels Ltd	HUTOXY KERSI BHADHA	SELL	130800	226.1

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