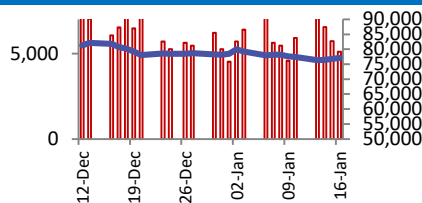
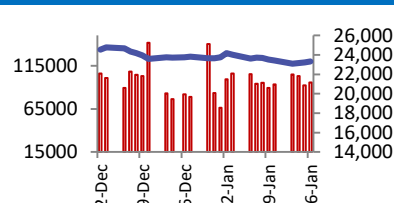


**BSE**



Open	77320
High	77320
Low	76896
Close	77043
Change	319
Volume (Lacs)	5893
Turnover (Rs.inCr)	5108

**NSE**



Open	23377
High	23392
Low	23272
Close	23312
Change	99
Volume(Lacs)	31797
Turnover(Rs.in Cr)	95671

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	43153	43222	(68)	-0.2%
Dow Futures	43386	43372	14	0.0%
Nasdaq	19338	19511	(173)	-0.9%
FTSE	8392	8301	91	1.1%
Nikkei	38193	38573	(380)	-1.0%
Hang Seng	19491	19523	(32)	-0.2%
Gift Nifty	23322	23324	(2)	0.0%
Straits Singapore	3814	3801	13	0.3%
South Korea	2520	2527	(8)	-0.3%
Taiwan	22970	23025	(55)	-0.2%
Shanghai	3232	3236	(4)	-0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9231	9168	63	0.7%
Alumin (\$/MT)	2637	2602	35	1.3%
Zinc (\$/MT)	2875	2863	12	0.4%
Brent Crude (\$/bbl)	82	81	0	0.4%
Gold (\$/Ounce)	2716	2714	2	0.1%
Silver (\$/Ounce)	31	31	(0)	-0.1%
Light Crude (\$/bbl)	79	79	0	0.6%
N G (\$/mmbtu)	4	4	0	0.1%
Sugar (\$/MT)	485	473	13	2.6%
Rubber (Rs./kg)	192	192	0	0.0%
Baltic Dry Index	1023	1063	(40)	-3.8%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	86.55	86.36	0.22%
Rs./ Euro	89.03	89.03	0.00%
Rs./Chinese Yuan	11.81	11.78	0.22%
Yen /\$ rate	155.40	155.16	0.15%
\$ US/Euro	1.03	1.03	0.03%

Dollar Index	Current	Previous	Var(%)
Dollar Index	108.96	108.96	0.00%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	23240	49200
Support 2	23170	49000
Resistance	23370	49740

Securities in Ban For Trade	
AARTIIND	ANGELONE
BANDHANBNK	HINDCOPPER
ABFRL	KALYANKJIL
LTF	RBLBANK
MANAPPURAM	

**Market Review**

**US:** US stock market ended lower on Thursday as investors eyed the most recent corporate earnings and gauged economic data.

**Asia:** Asian markets traded lower on Friday following overnight weakness on Wall Street and as investors await key economic data from China.

**India:** On Thursday, the Indian stock market extended its winning streak for the third consecutive trading session tracking upbeat global cues. **Market is expected to open on a negative note and likely to witness range bound move during the day.**

**Global economy:** China's economy grew more than expected in the fourth quarter of 2024, as Beijing doled out a slew of stimulus measures aimed at supporting growth. GDP grew 5.4% year-on-year in the three months to December, more than expectations of 5% and picking up sharply from the 4.6% seen in the prior quarter. This brought annual GDP to 5%, just in line with Beijing's 5% growth target. The Chinese economy grew 5% for the second consecutive year, with Beijing having set a similar target for 2025.

Chinese industrial production grew more than expected in December as recent stimulus measures from Beijing supported business activity, while retail sales beat expectations as private spending rebounded. Industrial production grew 6.2% year-on-year in December, higher than the median forecast of 5.4% growth, government data showed on Friday. It compares to a 5.4% rise seen in the prior month. This brought the annual industrial production growth for 2024 to 5.8%, in line with last year's rise.

**Commodities:** Oil prices climbed on Friday, heading for a fourth weekly gain, driven by concerns over tighter supply following U.S. sanctions on Russian oil producers and signals from a Federal Reserve official of potential interest rate cuts.

Gold prices firmed on Friday and were headed for a third straight week of gains after U.S. data this week hinted that the Federal Reserve might continue easing interest rates this year.

**Currency:** The Japanese yen held its recent advance to around 155.3 per dollar on Friday and was on track for its strongest week since late November, bolstered by growing speculation that the Bank of Japan could raise interest rates again 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	43462	2816	50754	3697	(881)	448816	31852	442686	30826	6130	1026
Index Option	15027607	2384157	14848327	2365976	18181	4223976	359606	5641931	603026	(1417955)	(243420)
Stock Future	399042	25044	467758	29675	(4631)	5519097	341294	5585017	343179	(65920)	(1885)
Stock Option	1260149	80976	1263451	81427	(451)	1569503	96953	1510033	92142	59470	4811
<b>Total</b>	<b>16730260</b>	<b>2492993</b>	<b>16630290</b>	<b>2480775</b>	<b>12218</b>	<b>11761392</b>	<b>829705</b>	<b>13179667</b>	<b>1069173</b>	<b>(1418275)</b>	<b>(239468)</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
9-Jan-25	9085	16115	(7029)
10-Jan-25	11363	12784	(1421)
13-Jan-25	12074	16351	(4276)
14-Jan-25	14710	22477	(7766)
15-Jan-25	11486	15883	(4397)
<b>Month to date- Jan</b>	<b>120091</b>	<b>154795</b>	<b>(34704)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
10-Jan-25	10097	12352	(2255)
13-Jan-25	10978	15871	(4893)
14-Jan-25	13794	21926	(8132)
15-Jan-25	11035	15569	(4533)
16-Jan-25	11078	15420	(4342)
<b>Month to date-Jan</b>	<b>122461</b>	<b>165719</b>	<b>(43258)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
10-Jan-25	14294	10332	3962
13-Jan-25	20134	12067	8066
14-Jan-25	17837	9935	7901
15-Jan-25	14430	10747	3683
16-Jan-25	14831	11902	2929
<b>Month to date-Jan</b>	<b>178219</b>	<b>131424</b>	<b>46794</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
9-Jan-25	3156	3875	(720)
10-Jan-25	2582	1983	600
13-Jan-25	3900	1384	2516
14-Jan-25	1156	1068	88
15-Jan-25	1569	1497	72
<b>Month to date- Jan</b>	<b>21482</b>	<b>28197</b>	<b>(6714)</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2778	68%	2037	72%
Decline	1188	29%	741	26%
Unchanged	101	2%	58	2%

Market Turnover	16-Jan	15-Jan	Var (%)
BSE Cash	5108	5722	-11%
NSE Cash	95671	92453	3%
NSE Futures	116551	107147	9%
NSE Options	32300828	19219712	68%
Total (Rs.Cr)	32518157	19425033	67%

Volatility Index	16-Jan	15-Jan
Volatility Index	15.47	15.26

Index PE - TTM	16-Jan	Yr. High	Yr. Low
Sensex	22.3	26.0	21.8
Nifty	21.5	24.4	20.8

Corporate News

**HFCL bags ₹2501-crore advance work order from BSNL**

The company has secured an order worth Rs 2,501 cr from BSNL for the middle-mile network of BharatNet Phase III in Punjab. The order is to be completed within a timeframe of three years. (NDTV)

**GMR ropes in two Indian partners for 900MW Upper Karnali hydel project**

The company has entered into a joint venture agreement with GMR Energy, GMR Power, and others for a hydroelectric power project. The agreement is for the execution and operation of a 900-megawatt hydroelectric power project in Nepal. (NDTV)

**AIA Engineering subsidiary to set up new manufacturing facilities in China and Ghana**

The company's UAE-based arm, Vega Industries, will set up facilities in China and Ghana to produce Hi-Chrome Grinding Media. The arm plans to invest \$50 mn for capacity expansion, adding 100,000 MTPA capacity in both countries. (NDTV)

Economy

**China strikes with export curbs: India's EV and solar boom faces supply chain chaos**

Indian electronics, solar, and EV sectors face delays due to China's export restrictions on key inputs and machinery, which may be a response to India's curbs on Chinese investments. Strengthening ties with Japan and South Korea is suggested to reduce reliance on Chinese imports and build resilient supply chains. (ET)

**India to grow at 6.7% for next 2 years**

India is set to remain the fastest growing major economy with a 6.7% growth rate in FY26 and FY27. Growth in the broader South Asian region is also expected to rise, driven by India's strong performance. The report highlights steady investment growth and improvement in GDP per capita for India and China. (ET)

International

**Brazil's Azul signs preliminary deal to explore merger with Gol**

Shares of Japanese videogame giant Nintendo fell sharply on Friday as investors appeared to be little enthused by the long-awaited reveal of the successor to the Switch console. The drop was the stock's biggest loss in three months. Nintendo revealed the Switch 2 in a two-minute video on Thursday, but offered few details on specifications, stating that more details will be revealed in April. (Inv)

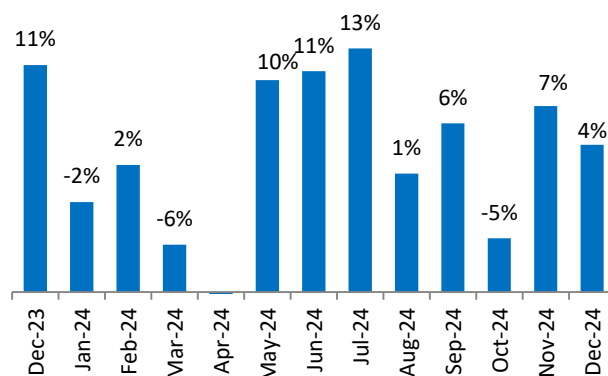
Top 5 Nifty Gainers	16-Jan	15-Jan	Var(%)
HDFCLIFE	641	594	7.9%
BEL	276	268	3.1%
SBILIFE	1514	1473	2.8%
SHRIRAMFIN	547	533	2.6%
ONGC	263	258	1.9%
Top 5 Nifty Losers	16-Jan	15-Jan	Var(%)
TRENT	6212	6390	-2.8%
DRREDDY	1303	1337	-2.6%
TATACONSUM	938	956	-1.9%
HCLTECH	1792	1826	-1.8%
WIPRO	288	293	-1.6%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	77043	0.4%	-0.7%	-4.5%	7.8%
MIDCAP	43744	0.9%	-3.2%	-8.5%	16.3%
SMLCAP	52309	1.4%	-3.2%	-8.1%	19.0%
AUTO	51641	0.7%	-2.0%	-2.6%	22.7%
BANKEKX	55945	1.1%	-0.5%	-7.0%	7.5%
Capital Goods	64158	1.6%	-1.8%	-11.6%	13.9%
FMCG	20154	-0.4%	-3.8%	-2.7%	-0.6%
Health Care	42565	0.2%	-4.9%	-3.2%	31.6%
IT	42810	-0.6%	-0.4%	-5.3%	14.1%
METAL	28272	1.6%	0.8%	-8.5%	9.4%
Oil & Gas	25784	0.9%	-1.5%	-2.5%	4.7%
Power	6635	1.5%	0.2%	-11.6%	11.3%
Realty	7298	0.5%	-6.4%	-16.2%	7.9%

NSE USD Futures	16-Jan	15-Jan	Var (%)
Jan Expiry (Rs./\$)	84.39	84.39	0.0%
Feb Expiry (Rs./\$)	84.42	84.42	0.0%
Total Turnover (Rs. Crore)	4195	4595	-9%

Sectors	TTM PE
Auto	29.76
Auto Ancillary	44.94
Banking	13.2
Engineering	47.61
Cement	84.93
Diamonds & Jewellery	56.01
Housing Finance	25.11
Infrastructure & Const	34.86
Metals-Aluminium	35.79
Metal – Steel	16.02
Oil Expl.	12.52
Pharma	9.65
Power – Gen. Supp.	43.6
Information Tech.	25.39
Sugar	22.1
Telecom Serv. Prov.	70.24
Tyres	27.25

**VECV: Monthly Sales Volume Growth (YoY)**  
(Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
<b>US</b>	4.61%	4.61%	(0) bps
<b>Japan</b>	1.19%	1.21%	(2) bps
<b>India</b>	6.75%	6.81%	(7) bps
<b>UK</b>	4.68%	4.73%	(5) bps
<b>Libor 3 Mths</b>	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	635	635	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)	-2247	-1958	(288.7)

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	21.57	22922717	22.89	9229895	-5.77%	1	1866.88	1928.45	-3.2%
Wipro	3.30	6241061	3.44	4316048	-4.07%	1	285.62	288.05	-0.8%
Dr.Reddy's	14.83	2912383	15.32	2361510	-3.20%	1	1283.54	1302.75	-1.5%
ICICI Bank	28.80	2884800	28.68	2671447	0.42%	2	1246.32	1249.10	-0.2%
HDFC Bank	58.64	1771213	59.16	2903923	-0.88%	3	1691.76	1652.05	2.4%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	40.50	40.40	0.1	0.2%
RIL	59.30	58.00	1.3	2.2%
SBI	88.40	87.00	1.4	1.6%

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	To be announced
China Inflation Data	09 Feb

Event Update

Name	Date	Purpose
Arunjyoti Bio Ventures Ltd.	17/01/25	Stock Split from Rs.10/- to Re.1/-
Jai Balaji Industries Ltd.	17/01/25	Stock Split from Rs.10/- to Rs.2/-
Kitex Garments Ltd.	17/01/25	Bonus issue
Kore Digital Ltd.	17/01/25	Bonus issue
Sattva Sukun Lifecare Ltd.	17/01/25	Bonus issue
Tata Consultancy Services Ltd.	17/01/25	Rs.10.00 per share(1000%)Third Interim Dividend
Vantage Knowledge Academy Ltd.	17/01/25	Rs.0.10 per share(10%)First Interim Dividend
Nava Ltd.	20/01/25	Stock Split from Rs.2/- to Re/1/-
Angel One Ltd.	21/01/25	Interim Dividend
BN Rathi Securities Ltd.	24/01/25	Stock Split from Rs.10/- to Rs.5/-
KEI Industries Ltd.	27/01/25	Interim Dividend
Persistent Systems Ltd.	29/01/25	Interim Dividend
Godrej Consumer Products Ltd.	03/02/25	Interim Dividend
Emami Ltd.	04/02/25	Second Interim Dividend
Manba Finance Ltd.	05/02/25	Second Interim Dividend
Computer Age Management Services Ltd.	07/02/25	Interim Dividend
Page Industries Ltd.	13/02/25	Third Interim Dividend

**Bulk Deal As On 16/01/25**

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
513149	ACROW	JAINAM UDAY SHAH	S	3569	715.02
540135	ARCFIN	HEMALI PATHIK THAKKAR	B	28000000	1.32
540135	ARCFIN	SAJM GLOBAL IMPEX PRIVATE LIMITED	S	60000000	1.32
540135	ARCFIN	UMA SHANKAR EXIM PRIVATE LIMITED	B	39714606	1.34
532694	ASMS	CENTILLION CAPITAL PRIVATE LTD.	B	1588000	22.12
543439	BRANDBUCKT	RAM SHAMKANT MAYEKAR	S	290000	11.73
526546	CHOKSILA	ALANKIT IMAGINATIONS LIMITED	S	125507	109.96
526546	CHOKSILA	ALANKIT IMAGINATIONS LIMITED	B	1523	115.75
526546	CHOKSILA	ESSENCE DEALMARK PRIVATE LIMITED	B	93455	109.54
539091	CITL	JIVAIB TRADING PRIVATE LIMITED	B	2015000	2.89
539884	DARSHANORNA	SANDEEP SARAF	B	318070	3.22
544331	DAVIN	DEEPAKSEETARAMJIDHOOT	S	74000	40.21
543521	FONE4	NEZONE HERBALS PVT LTD	B	100000	17.48
542850	GOBLIN	CRAFT EMERGING MARKET FUND PCC- ELITE CAPITAL FUND	B	84000	31.5
542850	GOBLIN	KOMALAY INVESTRADE PRIVATE LIMITED	S	84000	31.5
513337	GUJTLRM	EMINENCE GLOBAL FUND PCC- EUBILIA CAPITAL PARTNERS FUND I	S	3481204	14.64
513337	GUJTLRM	JNSP TRADING LLP	S	1222413	14.64
513337	GUJTLRM	JNSP TRADING LLP	B	1231191	14.63
513337	GUJTLRM	SAKET KUMAR	S	5601885	14.64
513337	GUJTLRM	SAKET KUMAR	B	189173	14.63
544160	JAYKAILASH	ADITYA JOSHI	B	35200	70.4
538765	JSHL	ASHOK KUMAR	S	35000	7.24
538765	JSHL	PRAVEEN ARORA	B	75000	7.24
544304	JUNGLECAM	ANUSHRIA REALTECH PRIVATE LIMITED	B	96000	85.08
544304	JUNGLECAM	M7 GLOBAL FUND PCC - NOLANA	S	91200	85.12
517431	NARMP	VEDKARTA CONSULTANTS LLP	B	25328	114.23
543579	NATURO	MINOLLO PRIVATE LIMITED	S	344000	6.4
543579	NATURO	PREMRATAN 0 DAMANI	B	176000	6.4
543579	NATURO	RAVIKIRAN DAMANI	B	108000	6.4
530805	OIVL	DEALMONEY COMMODITIES PRIVATE LIMITED	S	431674	13.61
530805	OIVL	SANDIP JAYSHUKHLAL SHAH	S	400000	13.61
530805	OIVL	SANDIP JAYSHUKHLAL SHAH	B	4016	13.58
530805	OIVL	SAUMIL ARVINDBHAI BHAVNAGARI	S	231016	13.61
530805	OIVL	VIPUL NARAYANBHAI PATEL	S	200000	13.61
511644	OMEGAIN	ASHOK DILIPKUMAR JAIN	B	21673	186.16
511644	OMEGAIN	GREEN PEAKS ENTERPRISES LLP	S	7250	184.57
511644	OMEGAIN	GREEN PEAKS ENTERPRISES LLP	B	220	200.36
511644	OMEGAIN	KARTIKBATHLA	S	4500	183.25
511644	OMEGAIN	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	8288	183.25
511644	OMEGAIN	VIHA ASHOK JAIN	B	9150	183.25
543400	OMNIPOENT	ASHOK DILIPKUMAR JAIN	S	62000	10.21
543400	OMNIPOENT	ASHOK DILIPKUMAR JAIN	B	2000	10.22
544330	PARMESHWAR	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	110000	70.45
544330	PARMESHWAR	PARNIKA AGARWAL	B	130000	71.59
512591	PULSRIN	PANKAJKUMAR DALPATBHAI PANCHAL	S	993268	15.77
512591	PULSRIN	RAJESH SUBHASH JANGAM	B	664029	15.51
541601	RAJNISH	SIDDHANT SHIRISH SHAH	S	5501000	1.03
544257	SAFE	VISHESH TONY JATIAA	S	33000	177.73
512589	SITAENT	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	15802	199.32
544303	TTC	SETU SECURITIES PVT. LTD.	B	9600	777.12

542803	VEL	ASHOKBHAI MADHUBHAI KORAT	S	45000	12
542803	VEL	PIYUSH SECURITIES PVT LTD	B	50000	12
542803	VEL	SHIVANG R VACHHETA	S	170056	12
542803	VEL	VARSHA VAIBHAV PATIL	B	120000	12
544002	VIVAA	ARYAFIN-TRADE SERVICES INDIA PRIVATE LIMITED	S	20000	34.9

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
DCMNVL	DCM Nouvelle Limited	NIRMAL BANG EQ PVT.LTD	BUY	164000	193.64
DELTIC	Delta Autocorp Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	109000	152.85
IDEALTECHO	Ideal Technoplast Ind Ltd	SHITAL BHAVESHKUMAR SHAH	BUY	35000	139
KANDARP	Kandarp Dg Smart Bpo Ltd	AUS ENTERPRISES	BUY	200000	50.53
KANDARP	Kandarp Dg Smart Bpo Ltd	YELLOWSTONE VENTURES LLP	SELL	184000	50.5
RILINFRA	Rachana Infra Ltd	RANVIR DESAI	SELL	100000	36.35
SHANTI	Shanti Overseas (Ind) Ltd	REX PIPES AND CABLES INDUSTRIES LIMITED	SELL	60000	16

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