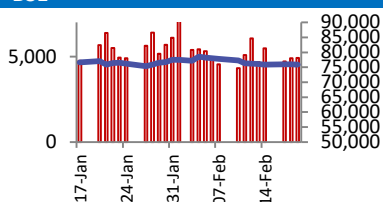
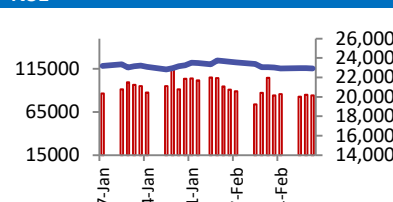


BSE



Open	75787
High	76339
Low	75581
Close	75939
Change	-28
Volume (Lacs)	5109
Turnover (Rs.inCr)	4917

NSE



Open	22847
High	23050
Low	22815
Close	22933
Change	-12
Volume(Lacs)	28589
Turnover(Rs.in Cr)	84204

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44628	44556	71	0.2%
Dow Futures	44644	44711	(67)	-0.1%
Nasdaq	20056	20041	15	0.1%
FTSE	8713	8767	(54)	-0.6%
Nikkei	38580	39165	(585)	-1.5%
Hang Seng	22546	22944	(398)	-1.7%
Gift Nifty	22906	22946	(40)	-0.2%
Straits Singapore	3929	3934	(5)	-0.1%
South Korea	2659	2672	(13)	-0.5%
Taiwan	23521	23604	(83)	-0.4%
Shanghai	3345	3352	(6)	-0.2%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9467	9472	(6)	-0.1%
Alumin (\$/MT)	2687	2669	19	0.7%
Zinc (\$/MT)	2876	2884	(8)	-0.3%
Brent Crude (\$/bbl)	76	76	(0)	-0.4%
Gold (\$/Ounce)	2944	2933	10	0.3%
Silver (\$/Ounce)	33	33	0	0.3%
Light Crude (\$/bbl)	72	72	(0)	-0.4%
N G (\$/mmbtu)	4	4	0	2.1%
Sugar (\$/MT)	548	542	6	1.1%
Rubber (Rs./kg)	191	190	1	0.3%
Baltic Dry Index	904	841	63	7.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	86.96	86.88	0.10%
Rs./ Euro	90.99	90.99	-0.01%
Rs./Chinese Yuan	11.94	11.96	-0.17%
Yen /\$ rate	150.69	151.47	-0.51%
\$ US/Euro	1.04	1.04	0.07%

Dollar Index	Current	Previous	Var(%)
Dollar Index	107.03	107.17	-0.14%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22840	49440
Support 2	22770	49200
Resistance	23000	49840

Securities in Ban For Trade
MANAPPURAM

Market Review

US: U.S. stocks inched higher Wednesday, reversing earlier declines, as investors paused to digest Federal Reserve meeting minutes, new housing data and fresh tariff threats from President Trump.

Asia: Markets in the Asia-Pacific region were mostly lower on Thursday, as investors assessed Trump's proposal to levy 25 per cent tariffs on auto, chip and pharmaceutical import.

India: The benchmark Indian equity indices ended Wed's choppy session on a flat note with a slightly negative bias due to selling in IT stocks, broader markets witnessed a lot of optimism as mid & small-cap stocks rallied after the recent selloff. **Market is expected to open on a negative note and likely to witness range bound move during the day.**

Global economy: Australia's job market surged much more past expectations in Jan, mainly attributable to gains in the female workforce, showing continued resilience in the labor market. The total number of employed people grew by 44,000 in Jan.

The rise was reported in inventory levels of US crude oil, gasoline, and distillate stocks. The latest data reveals that the actual stock levels have reached 3.339 mn barrels. This new figure, while indicating an increase, still falls short of the forecasted rise of 2.200 mn barrels. The lower-than-expected increase implies a greater demand for crude oil, which is traditionally bullish for crude prices.

Commodities: Oil prices fell in Asian trading on Thursday after a one-week high, dragged by an unexpected increase in crude oil inventories and ongoing geopolitical developments concerning potential peace negotiations between Russia and Ukraine.

Gold prices edged higher on Thursday, hovering near their all-time highs as concerns persisted over Donald Trump's tariff strategies, which could fuel inflation and escalate a global trade war.

Currency: The U.S. dollar held steady on Thursday as investors pondered what U.S. President's latest tariff agenda would mean for the global economy and how it could affect the interest rate outlook for major central banks.

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	23868	3789	22069	3606	183	275073	43971	274348	43580	725	391
Index Option	5040910	855532	5033370	853608	1924	2272727	375986	2220064	365884	52663	10102
Stock Future	399287	24008	382393	23283	725	5852320	351588	5835138	348918	17182	2670
Stock Option	1478224	93682	1454911	92429	1253	1737544	100545	1686061	96696	51483	3849
Total	6942289	977011	6892743	972926	4085	10137664	872090	10015611	855078	122053	17012

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
12-Feb-25	13009	17885	(4876)
13-Feb-25	12933	15129	(2196)
14-Feb-25	8848	13872	(5023)
17-Feb-25	9143	11265	(2123)
18-Feb-25	9143	11265	(2123)
Month to date- Feb	141530	169947	(26294)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
13-Feb-25	12124	14914	(2790)
14-Feb-25	9064	13359	(4295)
17-Feb-25	6827	10765	(3938)
18-Feb-25	14538	9751	4787
19-Feb-25	11571	13452	(1881)
Month to date-Feb	159280	189496	(30216)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
13-Feb-25	13148	10214	2935
14-Feb-25	12827	8463	4364
17-Feb-25	12504	7744	4760
18-Feb-25	12793	9721	3072
19-Feb-25	11193	9235	1958
Month to date-Feb	185691	149882	35809
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
12-Feb-25	1506	2500	(994)
13-Feb-25	630	5653	(5022)
14-Feb-25	693	2433	(1740)
17-Feb-25	2347	2849	(502)
18-Feb-25	2347	2849	(502)
Month to date- Feb	21189	25604	(3912)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2782	68%	2127	74%
Decline	1182	29%	700	24%
Unchanged	110	3%	54	2%

Market Turnover	19-Feb	18-Feb	Var (%)
BSE Cash	4917	4910	0%
NSE Cash	84204	84876	-1%
NSE Futures	122364	95068	29%
NSE Options	19537772	11452161	71%
Total (Rs.Cr)	19749257	11637015	70%

Volatility Index	19-Feb	18-Feb
Volatility Index	15.42	15.67

Index PE - TTM	19-Feb	Yr. High	Yr. Low
Sensex	21.1	25.7	21.1
Nifty	20.4	24.4	20.4

Corporate News

Thomas Cook, SOTC Partner with Korea Tourism Organisation for Special Projects

Thomas Cook (India) Ltd., and its group company SOTC Travel have signed a 24-month partnership with Korea Tourism Organisation for a collaboration that focuses on Special Projects towards increasing visibility for the destination in the high-potential India market. (NDTV)

Waaree Energies Secures 362.5 MWp Solar PV Module Order from Domestic Entity

Waaree Energies has bagged an order from a domestic entity to supply solar PV modules of 362.5 MWp capacity. The company did not disclose the name of the company which placed the order. "The Company has today received an order for supply of solar modules for 362.5 MWp from a renowned customer engaged in the business of owning, developing and operating renewable power projects. (NDTV)

Mahindra Partners with Anduril to Develop Advanced Autonomous and Counter-Drone Systems

The Mahindra Group has tied up with US defence technology firm Anduril Industries to co-develop and produce autonomous maritime systems to counter drone threats, providing enhanced protection against unmanned aerial systems. (ET)

Economy

Govt eases norms for import of vintage cars

The government has eased import norms for "vintage motor vehicles" by actual users. Previously limited to cars manufactured before January 1, 1950, imports are now allowed for broader vintage classifications. However, these vehicles must comply with the Motor Vehicles Act, 1988, if used on public roads. (ET)

India-Russia trade via INSTC doubles in past year

Trade between India and Russia via the INSTC has doubled in the past year, significantly reducing delivery times and costs. Bilateral trade reached a record USD 66 billion in 2024, with plans to achieve USD 100 bn by 2030. Pharmaceuticals are among the key sectors for further trade diversification. (ET)

International

Berkshire Hathaway sells another 750,000 DaVita shares

Warren Buffett's Berkshire Hathaway has sold an additional 750,000 shares of DaVita, reducing its stake in the kidney dialysis services provider by about 2% to 35.14 mn shares worth \$5.4 bn. The sales between February 14 and 19 totaled about \$115 mn. (Inv)

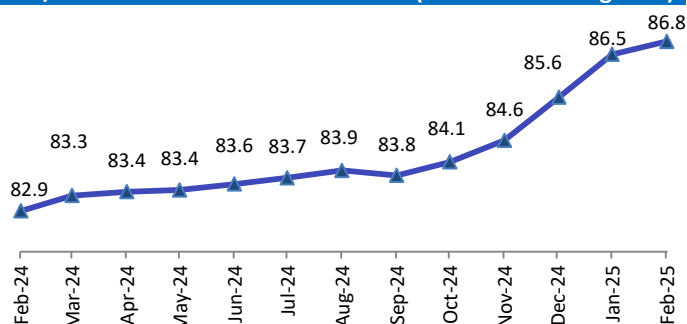
Top 5 Nifty Gainers	19-Feb	18-Feb	Var(%)
BEL	253	245	3.6%
HINDALCO	626	611	2.4%
EICHERMOT	4811	4719	1.9%
LT	3276	3220	1.7%
AXISBANK	1011	994	1.7%
Top 5 Nifty Losers	19-Feb	18-Feb	Var(%)
DRREDDY	1166	1197	-2.6%
TCS	3784	3873	-2.3%
INFY	1811	1852	-2.2%
HINDUNILVR	2250	2296	-2.0%
ADANIANT	2181	2220	-1.8%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	75939	0.0%	-0.3%	-1.5%	3.9%
MIDCAP	40377	1.3%	-0.9%	-8.3%	1.0%
SMLCAP	45456	2.4%	-3.6%	-13.8%	-1.0%
AUTO	48785	0.0%	-2.8%	-4.8%	4.3%
BANKEK	56461	1.0%	0.5%	0.8%	5.7%
Capital Goods	57780	2.2%	-1.9%	-12.2%	3.6%
FMCG	19048	0.1%	-2.1%	-6.3%	-2.1%
Health Care	40104	-0.3%	-1.8%	-6.7%	12.2%
IT	40029	-1.2%	-2.3%	-4.3%	3.7%
METAL	28273	1.4%	2.0%	-2.3%	4.0%
Oil & Gas	23851	0.7%	0.1%	-9.3%	-18.0%
Power	5979	1.3%	0.1%	-12.0%	-9.8%
Realty	6575	1.6%	0.1%	-11.6%	-6.2%

NSE USD Futures	19-Feb	18-Feb	Var (%)
Feb Expiry (Rs./\$)	N/A	84.83	0.0%
Mar Expiry (Rs./\$)	N/A	87.01	0.0%
Total Turnover (Rs. Crore)	N/A	4673	0%

Sectors	TTM PE
Auto	29.83
Auto Ancillary	38.13
Banking	12.71
Engineering	45.46
Cement	71.74
Diamonds & Jewellery	45.03
Housing Finance	23.8
Infrastructure & Const	31.89
Metals-Aluminium	25.15
Metal – Steel	15.98
Oil Expl.	8.58
Pharma	8.84
Power – Gen. Supp.	37.4
Information Tech.	24.95
Sugar	16.28
Telecom Serv. Prov.	44.6
Tyres	27.18

USD/INR (Source: Investing.com)



10 year G-Sec Yield	Current	Previous	Change
US	4.52%	4.53%	(2) bps
Japan	1.43%	1.44%	(0) bps
India	6.69%	6.69%	(1) bps
UK	4.61%	4.56%	5 bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	638	638	0.0%
Inflation - WPI	2.31%	2.37%	(6) bps
Inflation - CPI	4.31%	5.22%	(91) bps

India GDP	Q2FY25	Q1FY25	Var(%)
Growth	5.36%	6.65%	(129) bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.25%	6.50%	(25) bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.00%	4.00%	0 bps
O/S Banking System Liquidity (Rs bn)	-1873	-1548	(324.7)

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

Bulk Deal As On 19/02/25

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
534733	AERPACE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	869262	26.04
543767	BTML	AUGMENTA VALUE TRUST SCHEME 1	B	5200000	8.93
543767	BTML	BSEL INFRASTRUCTURE REALTY LIMITED	S	9600000	8.93
543767	BTML	NARINDER BAJAJ	B	2200000	8.93
542934	CBPL	M7 GLOBAL FUND PCC - NOLANA	B	46000	64.61
531099	CHECKPOINT	AMAYVATSALYA	B	70864	15.16
531099	CHECKPOINT	CHARU MEHRA	B	80000	15.38
531099	CHECKPOINT	VIJAY VINAYCHANDRA DOSHI	S	59000	15.26
539091	CITL	MANJULABEN BHAVSONGA THAKOR	S	1885853	2.18
539091	CITL	SAPTSWATI PRIVATE LIMITED	S	2746227	2.18
540403	CLEUCATE	SETU SECURITIES PVT. LTD.	S	280700	94.16
508980	FRONTCAP	SACHINBHANUBHAIMANSETA	B	96362	20.98
539692	IFINSER	HARDIKGIRISHKUMARSANGHVIHUF	S	63257	29.92
539692	IFINSER	MANOJKUMAR JAGDISHLAL ARORA	B	50000	29.71
539692	IFINSER	MIHIRARORA	B	50000	29.99
539692	IFINSER	SHAILESH MULSHANKER RAJYAGURU (HUF)	S	75494	29.59
513295	IMEC	STANLEY EVERESTANTONY MENEZES	B	13578	61.62
539175	INDRAIND	SHAILESH DHAMELIYA	B	50000	8.14
543286	JETMALL	ALTAF DAWOOD GADAD	S	30000	8.76
543286	JETMALL	R D SHAH STOCK BROKERS PRIVATE LIMITED	B	36000	8.98
533343	LOVABLE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	94000	91.8
526891	MKTCREAT	HARIVADAN MUKUNDBHAI PATEL	S	40000	15.9
526891	MKTCREAT	MADHURI MUKESH JOSHI	B	40000	15.9
532649	NECLIFE	SETU SECURITIES PVT. LTD.	S	1170253	29.06
530805	OIVL	AABHASH ENTERPRISES PRIVATE LIMITED	B	175000	10.33
530095	PRADHIN	JNSP TRADING LLP	B	420450	16.17
502448	ROLLT	KARISHMA DILIP BHATIA	B	1681360	1.47
540081	SABEVENTS	GUNASUNDAR SIBI	B	63950	5.18
531569	SANJVIN	MONIKA GARWARE	S	227509	243.44
519397	SHINDL	BALAJISINGH BONDILI	S	150000	81.64
519397	SHINDL	SANKET SHIVKANT SHARMA	B	328000	81.91
511493	SHRYDUS	SAUMIL A BHAVNAGRI HUF	S	465210	9.74
531205	SPRIGHT	HEMALI PATHIK THAKKAR	S	12000000	6.16
531205	SPRIGHT	TRANSPAACIFIC SHIPPING AND RESOURCES PRIVATE LIMITED	B	8000000	6.16
540914	SRUSTEELS	RAMJIBHAI BHIMJIBHAI KUKADIYA	B	300000	8.52
540914	SRUSTEELS	SRESTHA FINVEST LIMITED	S	664142	8.52
526071	STELLANT	KAILASH KUMAR MANWANI	S	3787	77.65
526133	SUPERTEX	PANKAJ KUMAR GOYAL	B	104998	7.68
526133	SUPERTEX	PANKAJ KUMAR GOYAL HUF	S	104228	7.68
542765	TRANSPACT	CORPORATE MAKERS CAPITAL LIMITED	S	6000	157.08
542765	TRANSPACT	VARUN JINDAL	B	5000	157
517562	TRIGYN	SETU SECURITIES PVT. LTD.	S	203151	84.4
539798	UMIYA	ARJUN LEASING AND FIN PVT LTD	B	100000	27.16
539798	UMIYA	BHIKHAJI KACHARAJI CHAVDA	S	91807	27.16
542803	VEL	DOLLY VISHAL SHAH	B	50000	12
542803	VEL	JASKARAN SINGH	B	49946	12
542803	VEL	SHANI BHATI	S	160000	12
542803	VEL	VARSHA VAIBHAV PATIL	B	100000	12

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ARCHIDPLY	Archidply Industries Limi	SUJATA DEVENDRA RATHI	BUY	193000	88.77
ARCHIDPLY	Archidply Industries Limi	VINIT DEVENDRA RATHI	SELL	192500	88.74
BGREENERGY	BGR Energy Systems Ltd	PARSHVA TRADING	SELL	387077	98.71
BSE	BSE Limited	GOLDMAN SACHS (SINGAPORE) PTE	BUY	728855	5504.42
CHAMUNDA	Chamunda Electrical Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	219000	52.65
CLEDUCATE	CL Educate Limited	SETU SECURITIES PVT LTD	BUY	280700	94.23
LOVABLE	Lovable Lingerie Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	94000	91.9
MAXVOLT	Maxvolt Energy Indus L	3 SIGMA GLOBAL FUND	SELL	88800	180
MAXVOLT	Maxvolt Energy Indus L	ABUNDANTIA CAPITAL VCC - ABUNDANTIA CAPITAL III	SELL	146400	180
MAXVOLT	Maxvolt Energy Indus L	BADAMI NARPATCHAND JAIN	BUY	160000	180
MAXVOLT	Maxvolt Energy Indus L	VIKASA INDIA EIF I FUND-INCUBE GLOBAL OPPORTUNITIES	SELL	144000	180
MAXVOLT	Maxvolt Energy Indus L	YASH HITESH PATEL	BUY	336000	179.99
MOBIKWIK	One Mobikwik Systems Ltd	SSPL SECURITIES PRIVATE LIMITED	SELL	600000	322.33
OLIL	Oneclick Logistics Ind L	KINNARI DARSHIT PATEL	SELL	37200	139.2
PSRAJ	P S Raj Steels Limited	AJAY PURSHOTTAMDAS GUPTA	BUY	39000	145
PSRAJ	P S Raj Steels Limited	ANSHUL AGGARWAL	BUY	50000	145
PSRAJ	P S Raj Steels Limited	GIRISH KUMAR AHUJA	BUY	100000	145
PSRAJ	P S Raj Steels Limited	RADHA MITTAL	BUY	40000	145
PSRAJ	P S Raj Steels Limited	SYGNIFIC CORPORATE SOLUTIONS PVT LTD	BUY	38000	145
RSSOFTWARE	R. S. Software (I) Ltd.	KIFTAR IN LLC	SELL	242784	88.54
SABAR	Sabar Flex India Limited	HIKMATBAHADUR KRISHABAHADUR KUNWAR	SELL	590000	7.81
SABAR	Sabar Flex India Limited	THAKOR NAYANA CHANDUBHAI	BUY	550000	7.8
SHANTI	Shanti Overseas (Ind) Ltd	GAJANAND JASHWANTBHAI TAILOR	BUY	290000	10.96
SHANTI	Shanti Overseas (Ind) Ltd	HETALBEN PRAVINBHAI THAKKAR	SELL	115968	10.96
SHANTI	Shanti Overseas (Ind) Ltd	JAWERILAL BAFNA DILKUSH BAFNA	BUY	150000	10.96
SHANTI	Shanti Overseas (Ind) Ltd	PRAVINKUMAR GANESHBHAI THAKKAR	SELL	82016	10.96
SHANTI	Shanti Overseas (Ind) Ltd	SUMIT PARMANAND BAJAJ	SELL	57062	11.03
SHANTI	Shanti Overseas (Ind) Ltd	TAILOR HEMLATABEN JASHVANTBHAI	SELL	253471	10.96
TOUCHWOOD	Touchwood Entertain Ltd.	BALVEER SINGH SANKHLA	SELL	100000	78.48
TFCILTD	Tourism Finance Corp	ADITYA KUMAR HALWASIYA	BUY	500000	143.93
TRIGYN	Trigyn Technologies Ltd	SETU SECURITIES PVT LTD	BUY	203151	84.5
TRU	TruCap Finance Limited	SAMEER KISHORE DOSHI	BUY	600000	11.01
TRU	TruCap Finance Limited	WILSON HOLDINGS PRIVATE LIMITED	SELL	765916	11.03
VERTEXPLUS	Vertexplus Technologies L	AXITA EXPORTS PRIVATE LIMITED	SELL	30000	79.07
VERTEXPLUS	Vertexplus Technologies L	CRAFT EMERGING MARKET FUND PCC- ELITE CAPITAL FUND	BUY	36600	81
VERTEXPLUS	Vertexplus Technologies L	V JOSHI IMPEX PRIVATE LIMITED	SELL	36600	81
VITAL	Vital Chemtech Limited	CRAFT EMERGING MARKET FUND PCC- ELITE CAPITAL FUND	BUY	120000	70.5
VITAL	Vital Chemtech Limited	V JOSHI IMPEX PRIVATE LIMITED	SELL	120000	70.5
VOLERCAR	Voler Car Limited	AARTH.AIF	BUY	72000	89.5
VOLERCAR	Voler Car Limited	AB WOOD PRODUCTS PVT LTD	BUY	108800	90.57
VOLERCAR	Voler Car Limited	AB WOOD PRODUCTS PVT LTD	BUY	214400	91.53
VOLERCAR	Voler Car Limited	ANINDITA FASHIONS PRIVATE LIMITED	BUY	78400	90
VOLERCAR	Voler Car Limited	CRAFT EMERGING MARKET FUND PCC- ELITE CAPITAL FUND	SELL	99200	92.07
VOLERCAR	Voler Car Limited	GIRIJADHAVA VYAPAAR PRIVATE LIMITED	BUY	424000	90
VOLERCAR	Voler Car Limited	PARADISE MOON INVESTMENT FUND-I	BUY	99200	90
VOLERCAR	Voler Car Limited	SMC GLOBAL SECURITIES LIMITED	BUY	179200	89.89
VOLERCAR	Voler Car Limited	SUR MANGAL HOLDINGS PRIVATE LIMITED	BUY	78400	90
VOLERCAR	Voler Car Limited	SWYOM INDIA ALPHA FUND	SELL	179200	90
WINDLAS	Windlas Biotech Limited	SAMVITTI CAPITAL PRIVATE LIMITED ACTIVE ALPHA MULTICAP	SELL	115374	683.49

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