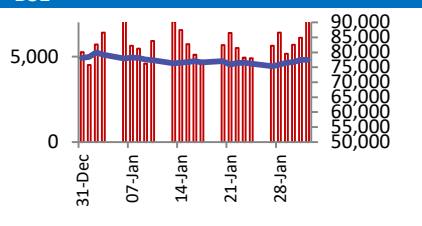
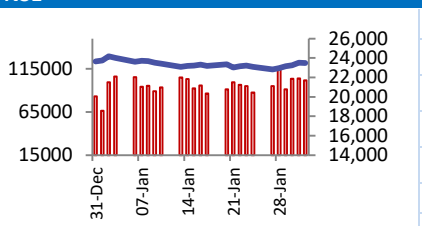


BSE		NSE																													
	<table border="1"> <tr><td>Open</td><td>77637</td></tr> <tr><td>High</td><td>77899</td></tr> <tr><td>Low</td><td>77006</td></tr> <tr><td>Close</td><td>77506</td></tr> <tr><td>Change</td><td>5</td></tr> <tr><td>Volume (Lacs)</td><td>5431</td></tr> <tr><td>Turnover (Rs.inCr)</td><td>7183</td></tr> </table>	Open	77637	High	77899	Low	77006	Close	77506	Change	5	Volume (Lacs)	5431	Turnover (Rs.inCr)	7183		<table border="1"> <tr><td>Open</td><td>23529</td></tr> <tr><td>High</td><td>23632</td></tr> <tr><td>Low</td><td>23318</td></tr> <tr><td>Close</td><td>23482</td></tr> <tr><td>Change</td><td>-26</td></tr> <tr><td>Volume(Lacs)</td><td>39715</td></tr> <tr><td>Turnover(Rs.in Cr)</td><td>101790</td></tr> </table>	Open	23529	High	23632	Low	23318	Close	23482	Change	-26	Volume(Lacs)	39715	Turnover(Rs.in Cr)	101790
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World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44545	44882	(337)	-0.8%
Dow Futures	44061	44698	(637)	-1.4%
Nasdaq	19627	19682	(54)	-0.3%
FTSE	8674	8647	27	0.3%
Nikkei	38613	39572	(960)	-2.4%
Hang Seng	19959	20225	(266)	-1.3%
Gift Nifty	23367	23568	(201)	-0.9%
Straits Singapore	3845	3856	(11)	-0.3%
South Korea	2442	2517	(75)	-3.0%
Taiwan	22651	23525	(875)	-3.7%
Shanghai	3251	3251	Closed	Closed

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8927	9048	(122)	-1.3%
Alumin (\$/MT)	2557	2594	(38)	-1.4%
Zinc (\$/MT)	2714	2742	(29)	-1.0%
Brent Crude (\$/bbl)	76	76	0	0.5%
Gold (\$/Ounce)	2776	2798	(23)	-0.8%
Silver (\$/Ounce)	31	31	(1)	-1.8%
Light Crude (\$/bbl)	74	73	1	1.4%
N G (\$/mmbtu)	3	3	0	9.0%
Sugar (\$/MT)	502	503	(1)	-0.2%
Rubber (Rs./kg)	193	192	1	0.5%
Baltic Dry Index	735	715	20	2.8%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	86.62	86.63	-0.01%
Rs./ Euro	89.96	90.16	-0.22%
Rs./ Chinese Yuan	11.89	11.91	-0.10%
Yen / \$ rate	155.51	155.19	0.21%
\$ US/Euro	1.02	1.04	-1.29%

Dollar Index	Current	Previous	Var(%)
Dollar Index	109.76	108.37	1.28%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	23340	49470
Support 2	23270	49240
Resistance	23570	50000

Securities in Ban For Trade
NIL

Market Review

US: U.S. stocks ended lower on Friday, with indexes losing ground after the White House said U.S. President Donald Trump will implement on Saturday tariffs of 25% on Canadian and Mexican imports and 10% on Chinese goods.

Asia: Asia-Pacific markets dropped after Trump tariffs on Mexico, Canada and China.

India: Benchmark equity indices settled on a flat note on Saturday, after the Finance Minister Nirmala Sitharaman presented the Union Budget 2024-25 in Parliament. **Market is expected to open on a gap down note and likely to witness sideways move during the day.**

Global economy: Chinese manufacturing activity grew less than expected in January as U.S. tariff fears continued to weigh on the country's economic outlook, private purchasing managers index data showed on Monday. The Caixin manufacturing PMI grew 50.1 in January, below expectations of 50.6 and the prior month's reading of 50.5. The Caixin data comes just a week after government PMI, which showed the manufacturing sector unexpectedly shrinking in January.

Australian retail sales shrank less than expected in December, as strength in the labor market and year-end holiday shopping kept consumer spending relatively strong. The reading was better than expectations for a drop of 0.7%. Australian retail spending usually falls off in December after a strong November, as Black Friday discounting sees cost-conscious customers spend more. But this boost appeared to have spilled over into December.

Commodities: Oil prices jumped on Monday after U.S. President Donald Trump imposed tariffs on Canada, Mexico and China, raising fears of crude supply disruption from two of the biggest suppliers to the U.S., but the prospect of lower fuel demand capped gains.

Gold prices fell in early Asian hours on Monday, pressured by a stronger dollar as fears of a global trade war mounted after U.S. President Donald Trump imposed sweeping tariffs on Canada, Mexico and China over the weekend.

Currency: The U.S. dollar's gains were broad, with the euro also dropping to a more than two-year low and the Swiss franc - despite typically acting as a safe haven - sliding to the weakest since May.

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	24941	4179	24951	4013	166	230102	37710	228524	37723	1578	(13)
Index Option	4892351	848128	4892393	844815	3313	2624415	450883	2213164	380852	411251	70031
Stock Future	177438	11038	171448	10110	928	5677260	354227	5618074	350765	59186	3462
Stock Option	935546	58473	964850	60229	(1756)	649023	39063	558863	33647	90160	5416
Total	6030276	921818	6053642	919167	2651	9180800	881883	8618625	802987	562175	78896

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
24-Jan-25	11537	14403	(2866)
27-Jan-25	10440	14955	(4514)
28-Jan-25	13195	16136	(2941)
29-Jan-25	8230	10026	(1796)
30-Jan-25	15114	16868	(1754)
Month to date- Jan	251531	324207	(72676)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
28-Jan-25	11166	16087	(4921)
29-Jan-25	7644	10231	(2586)
30-Jan-25	10514	15097	(4583)
31-Jan-25	14000	15189	(1189)
1-Feb-25	988	2315	(1327)
Month to date-Feb	243687	332389	(88702)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
28-Jan-25	19735	12921	6814
29-Jan-25	12871	11079	1793
30-Jan-25	13934	11768	2166
31-Jan-25	13550	11317	2232
1-Feb-25	13364	12540	824
Month to date-Feb	353053	265637	87416
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
24-Jan-25	1249	1528	(279)
27-Jan-25	4163	1510	2653
28-Jan-25	5478	1697	3781
29-Jan-25	2050	1544	506
30-Jan-25	1679	624	1054
Month to date- Jan	46424	41330	5095

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2030	50%	1387	49%
Decline	1884	47%	1356	48%
Unchanged	123	3%	74	3%

Market Turnover	01-Feb	31-Jan	Var (%)
BSE Cash	7183	6113	18%
NSE Cash	101790	103891	-2%
NSE Futures	156371	130723	20%
NSE Options	13931550	5929297	135%
Total (Rs.Cr)	14196893	6170024	130%

Volatility Index	01-Feb	31-Jan
Volatility Index	14.10	16.25

Index PE - TTM	01-Feb	Yr. High	Yr. Low
Sensex	22.1	25.7	21.5
Nifty	21.3	24.4	20.8

Corporate News

Happiest Minds inks pact to acquire Gavs Tech's Middle East biz

The company signed a deal with Gavs Technologies to buy 100% stake of their Middle East business to acquire existing customer relations, contracts & consolidate company's business in Middle East. The acquisition is expected to be completed by March 15, 2025 for a consideration of \$1.7 mn. (NDTV)

Lupin Announces Closure of Inspection by U.S. FDA at its Somerset Facility with No Observations

With zero observations, the US FDA has completed a pre-approval inspection of Edaravone oral suspension at its Somerset, New Jersey manufacturing facility. The inspection took place from January 28 to February 1, 2025. (FE)

Economy

Budget 2025: A blueprint for growth, resilience and global competitiveness

India's budget lays a roadmap for economic growth with measures like personal income tax recalibration to boost consumer spending, SME financing, and job creation in smaller towns. It aims to improve business competitiveness, fast-track regulatory approvals, and maintain fiscal discipline with a lower deficit target, signaling macroeconomic stability and investor confidence. (ET)

Budget 2025-26 allocates Rs 2,500 cr to new scheme for plug-play industrial parks

Finance Minister Nirmala Sitharaman has allocated Rs 2,500 cr for a new scheme for plug and play industrial parks in Budget 2025-26. The Department for Promotion of Industry and Internal Trade received a 64% budget increase to Rs 13,145.06 crore. Significant allocations include intellectual property, footwear development, industrial corridor development, and Jammu and Kashmir's industrial development. (ET)

International

OpenAI launches new AI tool to facilitate research tasks

Generative artificial intelligence heavyweight OpenAI launched a new AI tool on Sunday called "deep research", which conducts multi-step research on the internet for complex tasks. Deep research is powered by a version of the upcoming OpenAI o3 model optimized for web browsing and data analysis. Users have to give a prompt and OpenAI's chatbot ChatGPT will find, analyze, and synthesize several online sources such as text, images, and PDFs to create a comprehensive report at the level of a research analyst. (Inv)

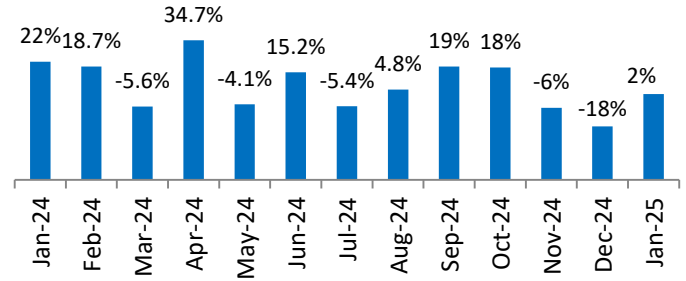
Top 5 Nifty Gainers	01-Feb	31-Jan	Var(%)
TRENT	6190	5753	7.6%
MARUTI	12917	12311	4.9%
TATACONSUM	1070	1025	4.4%
EICHERMOT	5390	5194	3.8%
BAJAJ-AUTO	9156	8848	3.5%
Top 5 Nifty Losers	01-Feb	31-Jan	Var(%)
POWERGRID	290	302	-3.9%
BEL	282	293	-3.7%
LT	3448	3567	-3.4%
GRASIM	2441	2509	-2.7%
CIPLA	1440	1479	-2.7%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	77506	0.0%	2.8%	-2.2%	7.5%
MIDCAP	42884	-0.5%	3.2%	-8.6%	10.2%
SMLCAP	50100	0.3%	3.6%	-10.7%	9.3%
AUTO	52428	1.7%	6.0%	-3.2%	18.3%
BANKEK	56222	-0.1%	2.8%	-2.9%	8.2%
Capital Goods	62582	-3.0%	2.4%	-8.3%	11.6%
FMCG	21153	2.9%	4.8%	0.2%	6.3%
Health Care	41845	0.1%	1.9%	-7.7%	23.9%
IT	41461	-1.2%	0.4%	-5.1%	9.0%
METAL	28145	-1.5%	1.6%	-3.7%	3.2%
Oil & Gas	24993	-1.7%	1.7%	-6.8%	-7.5%
Power	6381	-2.6%	1.1%	-9.3%	-1.5%
Realty	7415	3.7%	12.3%	-9.4%	9.8%

NSE USD Futures	01-Feb	31-Jan	Var (%)
Jan Expiry (Rs./\$)	84.91	84.91	0.0%
Feb Expiry (Rs./\$)	84.77	84.77	0.0%
Total Turnover (Rs. Crore)	5054	5054	0%

Sectors	TTM PE
Auto	31.86
Auto Ancillary	41.71
Banking	13.24
Engineering	46.03
Cement	83.15
Diamonds & Jewellery	50.65
Housing Finance	24.62
Infrastructure & Const	32.67
Metals-Aluminium	28.04
Metal – Steel	16.22
Oil Expl.	12.27
Pharma	9.58
Power – Gen. Supp.	39.84
Information Tech.	27.22
Sugar	21.58
Telecom Serv. Prov.	61.29
Tyres	26.14

Hero Moto: Monthly Sales Volume Growth (YoY)
(Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.50%	4.54%	(4) bps
Japan	1.23%	1.25%	(1) bps
India	6.70%	6.68%	2 bps
UK	4.54%	4.56%	(2) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	630	630	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)	-2160	-2527	366.9

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	21.95	9751813	21.82	6800631	0.60%	1	1901.23	1851.35	2.7%
Wipro	3.67	6066285	3.68	5970070	-0.27%	1	317.88	304.80	4.3%
Dr.Reddy's	13.82	2193621	13.81	1210767	0.07%	1	1197.04	1204.95	-0.7%
ICICI Bank	28.67	3464402	28.84	2697844	-0.59%	2	1241.64	1255.55	-1.1%
HDFC Bank	60.64	2024976	60.50	1415820	0.23%	3	1750.80	1690.95	3.5%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	40.90	39.40	1.5	3.8%
RIL	58.70	57.80	0.9	1.6%
SBI	88.80	87.80	1.0	1.1%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.90%	2.70%
Unemployment (%)	4.10%	4.20%

Interest Rate (%)	Current	Previous
Fed Rate	4.50%	4.50%

US GDP	Q3CY24	Q2CY24
Growth (QoQ Annualized)	2.30%	3.10%

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	27 Feb
US Unemployment Data	07 Feb
US Fed Rate	19 Mar
China GDP	16 Apr
China Inflation Data	09 Feb

Event Update

Name	Date	Purpose
Apcotex Industries Ltd.	03/02/25	Rs.2.00 per share(100%)Interim Dividend
Godrej Consumer Products Ltd.	03/02/25	Rs.5.00 per share(500%)Interim Dividend
Jubilant Ingrevia Ltd.	03/02/25	Rs.2.50 per share(250%)Interim Dividend
Mahanagar Gas Ltd.	03/02/25	Rs.12.00 per share(120%)Interim Dividend
Share India Securities Ltd.	03/02/25	Rs.0.20 per share(10%)Third Interim Dividend
Siyaram Silk Mills Ltd.	03/02/25	Rs.3.00 per share(150%)Second Interim Dividend
The Great Eastern Shipping Company Ltd.	03/02/25	Rs.8.10 per share(81%)Interim Dividend
Wheels India Ltd.	03/02/25	Rs.4.50 per share(45%)Interim Dividend
Aarti Drugs Ltd.	04/02/25	Rs.1.00 per share(10%)Interim Dividend
Aurionpro Solutions Ltd.	04/02/25	Rs.1.00 per share(10%)Interim Dividend
Emami Ltd.	04/02/25	Rs.4.00 per share(400%)Second Interim Dividend
KPIT Technologies Ltd.	04/02/25	Rs.2.50 per share(25%)Interim Dividend
LT Foods Ltd.	04/02/25	Rs.0.50 per share(50%)Interim Dividend
Orient Electric Ltd.	04/02/25	Rs.0.75 per share(75%)Interim Dividend
Redtape Ltd.	04/02/25	Bonus issue
SRF Ltd.	04/02/25	Rs.3.60 per share(36%)Second Interim Dividend
Sundaram Finance Holdings Ltd.	04/02/25	Dividend
GTV Engineering Ltd.	05/02/25	Rs.0.50 per share(5%)Interim Dividend
Indian Metals & Ferro Alloys Ltd.	05/02/25	Rs.5.00 per share(50%)Second Interim Dividend
Manba Finance Ltd.	05/02/25	Rs.0.25 per share(2.5%)Second Interim Dividend
MAS Financial Services Ltd.	05/02/25	Rs.1.00 per share(10%)Interim Dividend
Shree Cement Ltd.	05/02/25	Rs.50.00 per share(500%)Interim Dividend
SMC Global Securities Ltd.	05/02/25	Interim Dividend
Sona BLW Precision Forgings Ltd.	05/02/25	Rs.1.60 per share(16%)Interim Dividend
Thinkink Picturez Ltd.	05/02/25	Bonus issue
India Motor Parts & Accessories Ltd.	06/02/25	Rs.10.00 per share(100%)Interim Dividend
IRB Infrastructure Developers Ltd.	06/02/25	Third Interim Dividend
KSolves India Ltd.	06/02/25	Stock Split from Rs.10/- to Rs.5/-

Bulk Deal As On 01/02/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539528	AAYUSH	ALIA COMMOSALES LLP	S	344959	60.74
512361	CUPIDALBV	AYUSH DANDIA	B	5000	110.1
512361	CUPIDALBV	C LEELA BAI	S	13200	110.1
512361	CUPIDALBV	DHANKALASH DISTRIBUTORS PRIVATE LIMITED	B	11149	110.1
543378	CWD	PANKAJ PRASOON	S	20700	883
543378	CWD	PANKAJ PRASOON AND (HUF)	B	24100	884.67
541627	HITECHWIND	GLASTON MARIO MENEZES	S	29633	9.21
541627	HITECHWIND	SUDHANSHU KANDA	B	25000	9.21
544349	HMEML	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	B	78400	75
539449	IGCIL	JR SEAMLESS PRIVATE LIMITED	B	175000	7.46
541983	INNOVATIVE	ROHITASAWA	B	125000	32.5
544341	LICL	SANDEEP SINGH	B	124800	62.08
539521	NAVIGANT	MONEYPLANT GOLD & JEWELLERY TRADING L.L.C	B	32500	56.24
539521	NAVIGANT	SUNDEEP ARJUN KARNA HUF	S	25000	56.24
517554	NHCFOODS	ISHAAN TRADEFIN LLP	S	3088821	1.17
526415	OKPLA	KAUSHIK SHAH SHARES & SEC. LTD	S	2000000	17.41
531395	PADAMCO	HARDIK JAWAHARBHAI MEHTA	B	43000	161.81
512591	PULSRIN	BHAVESH DALPATBHAI PANCHAL	S	400000	16.15
539978	QUESS	AMAZON.COM NV INVESTMENT HOLDINGS LLC	S	754437	610.2
540072	SHIVAEXPO	ISHWIN KHARBANDA	S	70000	22.54
505515	SHYMINV	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	B	102000	9.51
505515	SHYMINV	SURENDRA JWRAJKA	S	102629	9.51
539310	THINKINK	JNSP TRADING LLP	S	3268153	1.26
539310	THINKINK	JNSP TRADING LLP	B	745556	1.26
506122	VOLKAI	GLASTON MARIO MENEZES	B	2010	247.9
506122	VOLKAI	VINAYAKMISHRA	B	2637	247.7

NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
FORGEAUTO	Forge Auto Internation L	SACHIN GOYAL	BUY	63600	97.97
NOIDATOLL	Noida Toll Bridge Co Ltd	NEO APEX VENTURE LLP	SELL	2240479	4.18
SMVD	SMVD Poly Pack Limited	NARESH KUMAR SARAOGI	BUY	64640	13.43

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