

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44748	44873	(126)	-0.3%
Dow Futures	44851	44863	(12)	0.0%
Nasdaq	19792	19692	100	0.5%
FTSE	8727	8623	104	1.2%
Nikkei	38894	39067	(173)	-0.4%
Hang Seng	21086	20892	194	0.9%
Gift Nifty	23718	23673	45	0.2%
Straits Singapore	3844	3830	14	0.4%
South Korea	2531	2537	(5)	-0.2%
Taiwan	23359	23317	42	0.2%
Shanghai	3293	3271	23	0.7%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9277	9240	37	0.4%
Alumin (\$/MT)	2619	2616	3	0.1%
Zinc (\$/MT)	2818	2780	38	1.4%
Brent Crude (\$/bbl)	75	74	0	0.5%
Gold (\$/Ounce)	2868	2856	12	0.4%
Silver (\$/Ounce)	32	32	0	0.4%
Light Crude (\$/bbl)	71	71	0	0.4%
N G (\$/mmbtu)	3	3	(0)	-0.8%
Sugar (\$/MT)	508	512	(4)	-0.8%
Rubber (Rs./kg)	192	191	1	0.3%
Baltic Dry Index	793	771	22	2.9%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	87.58	87.46	0.14%
Rs./ Euro	90.73	91.01	-0.31%
Rs./Chinese Yuan	12.01	12.03	-0.15%
Yen / \$ rate	151.65	151.41	0.16%
\$ US/Euro	1.04	1.04	-0.02%

Dollar Index	Current	Previous	Var(%)
Dollar Index	107.71	107.69	0.02%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	23540	50440
Support 2	23470	50200
Resistance	23670	50840

Securities in Ban For Trade
NIL

Market Review

US: The S&P 500 and the Nasdaq ended higher while the Dow closed lower after a choppy trading session on Thursday, as investors sifted through earnings reports and awaited Amazon's results after the bell and a key jobs report on Friday.

Asia: Asian stocks fell Friday after muted moves on Wall Street as traders awaited US jobs data that will help illuminate the path ahead for interest rates.

India: Indian markets closed slightly lower on February 6, weighed down by blue-chip stocks such as Titan, ITC, State Bank of India, and PowerGrid amid weaker earnings. Bharti Airtel emerged as the top loser among benchmark indices ahead of its key earnings release later today, contributing significantly to the market decline. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

Global economy: China's sluggish domestic consumption got a boost over the weeklong Lunar New Year holiday, with travel and retail sales both offering a slight reprieve to a dragging economy facing the prospect of an escalating US trade war. Official data showed there were 500 mn domestic tourist trips during the eight-day holiday period. That's a 5.9% jump from the same period last year, when travel numbers returned to pre-pandemic levels.

The Bank of England has reduced its main interest rate to 4.50% amidst concerns over the British economy struggling to grow. This marks the third rate cut in six months. Despite inflation currently at 2.5%, the bank expects it to trend downwards, justifying the rate cut.

Commodities: Oil prices rose marginally in early Asian trade on Friday but were on track for a third straight week of decline, hurt by U.S. President Donald Trump's renewed trade war on China and threats of tariff hikes on other countries.

Gold prices steadied on Friday near record-high levels, and were headed to log their sixth successive weekly gain, as trade war jitters lifted safe-haven demand, while investors awaited the non-farm payrolls data for cues on the U.S. economic health.

Currency: The Japanese Yen touched a nearly two-month high against the US Dollar on Friday.

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	12798	2082	19585	3304	(1222)	233023	38568	233682	38814	(659)	(246)
Index Option	11820373	2085196	11740095	2072759	12437	1965862	331661	3279422	567485	(1313560)	(235824)
Stock Future	354092	22490	457542	28950	(6460)	5686446	355777	5579634	351251	106812	4526
Stock Option	997371	63380	1024047	64924	(1544)	1091418	65795	985448	59932	105970	5863
Total	13184634	2173148	13241269	2169937	3211	8976749	791801	10078186	1017482	(1101437)	(225681)

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
30-Jan-25	15114	16868	(1754)
31-Jan-25	18093	18094	(1)
3-Feb-25	14406	18034	(3628)
4-Feb-25	18989	17960	1029
5-Feb-25	14873	16021	(1148)
Month to date- Feb	48268	52014	(3746)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
1-Feb-25	988	2315	(1327)
3-Feb-25	12506	16464	(3958)
4-Feb-25	18106	17297	809
5-Feb-25	14112	15795	(1683)
6-Feb-25	13470	17020	(3550)
Month to date-Feb	59181	68890	(9709)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
1-Feb-25	13364	12540	824
3-Feb-25	19319	16611	2708
4-Feb-25	15003	15433	(431)
5-Feb-25	12861	11864	996
6-Feb-25	11546	8824	2722
Month to date-Feb	72093	65273	6820
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
30-Jan-25	1679	624	1054
31-Jan-25	12328	2730	9598
3-Feb-25	2945	1002	1943
4-Feb-25	3107	774	2333
5-Feb-25	2299	1175	1124
Month to date- Feb	8351	2952	5399

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1847	45%	1287	45%
Decline	2098	52%	1520	53%
Unchanged	118	3%	50	2%

Market Turnover	06-Feb	05-Feb	Var (%)
BSE Cash	4825	5319	-9%
NSE Cash	90769	94512	-4%
NSE Futures	106783	109132	-2%
NSE Options	34945300	15505577	125%
Total (Rs.Cr)	35147678	15714540	124%

Volatility Index	06-Feb	05-Feb
Volatility Index	14.18	14.08

Index PE - TTM	06-Feb	Yr. High	Yr. Low
Sensex	22.2	25.7	21.5
Nifty	21.5	24.4	20.8

Corporate News

Welspun Enterprises Arm Wins Rs 291-Cr Construction Order From BMC

The company, a subsidiary of Welspun Enterprises Ltd., secured a Rs 290.9-crore design and construction order from the Brihanmumbai Municipal Corp. The project will include planning, designing and building the Mogra Storm Water Pumping Station in Mumbai's K/W Ward.(NDTV)

UltraTech Cement commissions grinding capacity at Sonar Bangla plant

The company commissioned an additional 0.6 MTPA of grinding capacity at its existing unit in Sonar Bangla. There was also additional capacity to service cement demand in the East India region. The cement manufacturer's total domestic grey cement capacity is now at 166.31 MTPA. (NDTV)

Info Edge to invest up to ₹1,000 cr in IE Venture Investment Fund III

The company is set to enter a contribution pact with IE Venture Investment to contribute up to Rs 1,000 cr directly or through arms. (NDTV)

Economy

Credit growth exceeds deposit growth in January, 24 fortnight

Bank lending growth surpassed deposit growth at the start of Q4, pressuring banks to increase deposit rates. Lending rose 11.4% year-on-year as of January 2025, while deposits grew 10.3%. RBI's measures and a focus on managing the Credit-to-Deposit ratio contributed to the slowdown. (ET)

10 more commodities added to e-NAM platform for trading

The Agriculture Ministry has approved an additional 10 commodities for trading on the e-NAM platform, bringing the total to 231. This move, following extensive stakeholder consultations, aims to offer farmers better prices through quality standards, particularly benefiting secondary trade products like chana sattu and asafoetida. (ET)

International

AI chip firm Cerebras partners with France's Mistral

Cerebras Systems, an artificial intelligence chip firm backed by UAE tech conglomerate G42, it has partnered with France's Mistral and has helped the European AI player achieve a speed record. Mistral, a maker of open-source AI technology, is aiming to challenge fellow open-source contenders Meta Platforms and China's DeepSeek, which rocked global markets late last month with claims of cutting-edge performance at low cost. (Inv)

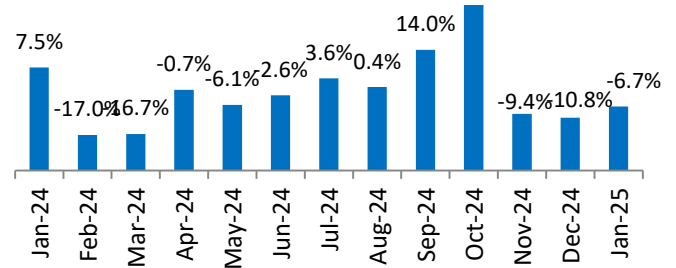
Top 5 Nifty Gainers	06-Feb	05-Feb	Var(%)
CIPLA	1472	1437	2.4%
ADANIPORTS	1164	1144	1.7%
INFY	1916	1897	1.0%
TATACONSUM	1023	1015	0.8%
DRREDDY	1237	1228	0.7%
Top 5 Nifty Losers	06-Feb	05-Feb	Var(%)
TRENT	5277	5750	-8.2%
BEL	280	289	-3.2%
BHARTIARTL	1620	1660	-2.5%
TITAN	3411	3491	-2.3%
NTPC	313	320	-2.1%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	78058	-0.3%	0.7%	-0.2%	8.2%
MIDCAP	42995	-0.9%	-0.2%	-6.8%	7.9%
SMLCAP	50505	0.0%	1.1%	-8.6%	8.6%
AUTO	52337	-0.9%	1.6%	-1.2%	15.0%
BANKEKX	57059	0.0%	1.4%	0.1%	9.9%
Capital Goods	61525	-0.8%	-0.9%	-8.6%	9.3%
FMCG	20305	-0.9%	-1.2%	-2.0%	2.5%
Health Care	43147	0.2%	3.2%	-5.1%	23.9%
IT	42399	0.3%	1.1%	-2.1%	9.9%
METAL	28236	-0.8%	-1.2%	-1.2%	0.0%
Oil & Gas	25241	-0.7%	-0.7%	-4.2%	-11.0%
Power	6290	-1.2%	-4.0%	-7.7%	-3.7%
Realty	7130	-2.1%	-0.3%	-10.8%	2.3%

NSE USD Futures	06-Feb	05-Feb	Var (%)
Feb Expiry (Rs./\$)	88.42	84.77	4.3%
Mar Expiry (Rs./\$)	84.86	84.86	0.0%
Total Turnover (Rs. Crore)	5413	5692	-5%

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

Escorts Monthly Volume Growth (YoY)
(Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.44%	4.43%	0 bps
Japan	1.29%	1.28%	1 bps
India	6.66%	6.66%	(1) bps
UK	4.49%	4.44%	5 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)	-838	-660	(177.3)

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	22.24	9375275	22.31	9911017	-0.31%	1	1947.83	1915.65	1.7%
Wipro	3.70	5127092	3.71	7786763	-0.27%	1	324.06	317.95	1.9%
Dr.Reddy's	13.94	1830179	13.97	1395038	-0.21%	1	1220.90	1236.65	-1.3%
ICICI Bank	29.06	3005651	29.18	5081831	-0.41%	2	1272.57	1272.40	0.0%
HDFC Bank	61.95	1379751	61.60	2195001	0.57%	3	1808.58	1743.85	3.7%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	38.30	38.70	(0.4)	-1.0%
RIL	58.90	58.60	0.3	0.5%
SBI	85.70	87.50	(1.8)	-2.1%

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

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
AGI Infra Ltd.	07/02/25	Stock Split from Rs. 10/- to Rs.5/-
Clean Science And Technology Ltd.	07/02/25	Rs.2.00 per share(200%)Interim Dividend
Computer Age Management Services Ltd.	07/02/25	Rs.17.50 per share(175%)Interim Dividend
Epigral Ltd.	07/02/25	Rs.2.50 per share(25%)Interim Dividend
GAIL (India) Ltd.	07/02/25	Rs.6.50 per share(65%)Interim Dividend
Garden Reach Shipbuilders & Engineers Ltd.	07/02/25	Interim Dividend
Gateway Distriparks Ltd.	07/02/25	Second Interim Dividend
Jasch Gauging Technologies Ltd.	07/02/25	Rs.5.00 per share(50%)Interim Dividend
Julien Agro Infratech Ltd.	07/02/25	Rs.0.05 per share(1%)Second Interim Dividend
Kirloskar Pneumatic Company Ltd.	07/02/25	Rs.3.50 per share(175%)Interim Dividend
Marico Ltd.	07/02/25	Interim Dividend
Nestle India Ltd.	07/02/25	Second Interim Dividend
Oil & Natural Gas Corporation Ltd.	07/02/25	Second Interim Dividend
Power Grid Corporation Of India Ltd.	07/02/25	Second Interim Dividend
Quess Corp Ltd.	07/02/25	Rs.4.00 per share(40%)Interim Dividend
Rama Phosphates Ltd.	07/02/25	Stock Split from Rs.10/- to Rs.5/-
Sangam Finserv Ltd.	07/02/25	Bonus issue
Shriram Pistons & Rings Ltd	07/02/25	Interim Dividend
Shyam Metalics And Energy Ltd.	07/02/25	Rs.2.25 per share(22.5%)Interim Dividend
Steelcast Ltd.	07/02/25	Rs.1.80 per share(36%)Third Interim Dividend
Tara Chand Infralogistic Solutions Ltd.	07/02/25	Dividend
Urban Enviro Waste Management Ltd.	07/02/25	Bonus
Wonder Electricals Ltd.	07/02/25	Rs.0.1000 per share(10%)Interim Dividend

Bulk Deal As On 06/02/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
544224	AFCOM	IMRAN KHAN	S	132480	811.36
544224	AFCOM	IMRAN KHAN	B	240	835
539946	BAZELINTER	RAJESH GUPTA	B	15000	84.83
539946	BAZELINTER	VEEET CAPITAL SERVICES PRIVATE LIMITED	S	15000	84.83
543435	CLARA	SHERWOOD SECURITIES PVT LTD	S	103750	30
508980	FRONTCAP	INIMITABLE CAPITALFINANCE PRIVATE LIMITED	S	333665	17.54
508980	FRONTCAP	SACHINBHANUBHAIMANSETA	B	200350	17.5
512443	GANONPRO	KIRAN KUMAR KANTIBHAI SHETH	S	58699	8
544348	GBLOGISTIC	HARSHA RAJESHBHAI JHAVERI	S	57600	63.28
544348	GBLOGISTIC	JINAL KALPESH DHAKAD	B	80400	63.28
543372	GETALONG	LAKSHMINARAYANAN SUBRAYAN	B	110000	36.69
543372	GETALONG	PREMILA RAJESH SONI	S	285000	36.69
524614	INDXTRA	NITIN GARG	S	372417	6.49
544023	KALYANI	AMIT RAJENDRA PRASAD AGARWAL	B	45000	415.9
544023	KALYANI	RAJESH KUMAR SINGLA	B	40000	412
544023	KALYANI	SANDEEP SINGH	B	42000	412
544023	KALYANI	VISISTH SERVICES LIMITED	S	173750	414.12
539762	MEAPL	DARSHANA MITESH CHOTHANI	S	80786	41.39
512415	MERCTRD	MULTITUDE GROWTH FUNDS LIMITED	S	100842	25.88
540809	MRCAGRO	KIRAN KUMAR KANTIBHAI SHETH	B	325000	11.74
540809	MRCAGRO	SHWETA ASHOK SINGH	S	199576	11.74
530805	OIVL	SAUMIL A BHAVNAGRI HUF	S	192991	11
530805	OIVL	SAUMIL ARVINDBHAI BHAVNAGARI	S	311765	11
530805	OIVL	SAUMIL ARVINDBHAI BHAVNAGARI	B	540205	10.99
530805	OIVL	VIBHU MAURYA	S	950000	10.99
531512	ORIENTTR	MANOJ N SHAH (HUF)	B	75000	35.49
526490	PRATIK	NITIN SAHEBRAO PALWE	S	320000	7.2
526490	PRATIK	SUSHIL KUMAR PUJARI	S	437247	7.2
512591	PULSRIN	ANISA ALNASIR GILANI	B	400000	20.78
512591	PULSRIN	COMFORT ADVERTISING PVT LTD	S	2157810	20.79
512591	PULSRIN	COMFORT ADVERTISING PVT LTD	B	343000	24.92
512591	PULSRIN	DHARABEN MUKESHBHAI PATEL	B	362130	20.78
512591	PULSRIN	GILANI INFRA PRIVATE LIMITED	B	1200000	22.66
512591	PULSRIN	RAJESH SUBHASH JANGAM	S	368936	21.18
511116	QUADRANT	IDBI TRUSTESHIP SERVICES LTD	S	4255956	0.48
538212	SHARPINV	JIGNESHBHUPENDRARUPARELIYA	S	1620193	0.72
539584	SIPTL	PRAMILA MEENA	S	734311	0.98
540914	SRUSTEELS	SRESTHA FINVEST LIMITED	S	88210	8.76
540914	SRUSTEELS	SRESTHA FINVEST LIMITED	B	302479	8.62
523752	TIHL	HIREN KIRANKUMAR MALA	S	500000	18.59
521005	TITANIN	SETU SECURITIES PVT. LTD.	S	248000	14.84
544329	VANDU	ASHIKA GLOBAL SECURITIES PRIVATE LIMITED	S	96000	53.61
542803	VEL	ASHOKBHAI MADHUBHAI KORAT	S	100000	11.7
542803	VEL	PIYUSH SECURITIES PVT LTD	B	42939	11.7
530057	VIVANZA	RAJ KUMAR BAID	S	222222	2.39
NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
DRL	Dhanuka Realty Limited	RAJESH KUMAR SODHANI HUF	BUY	54000	22.65
OLIL	Oneclick Logistics Ind L	PROMORE VENTURES PRIVATE LIMITED	SELL	40800	118
SIGACHI	Sigachi Industries Ltd	AMIT RAJ SINHA	SELL	1673823	42.88

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