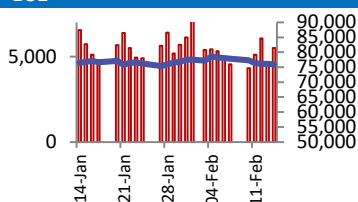
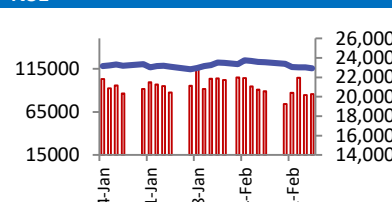


**BSE**



Open	76389
High	76483
Low	75440
Close	75939
Change	-200
Volume (Lacs)	5711
Turnover (Rs.inCr)	5491

**NSE**



Open	23096
High	23134
Low	22775
Close	22929
Change	-102
Volume(Lacs)	31924
Turnover(Rs.in Cr)	85658

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44546	44711	(165)	-0.4%
Dow Futures	44663	44635	28	0.1%
Nasdaq	20027	19946	81	0.4%
FTSE	8732	8765	(32)	-0.4%
Nikkei	39165	39149	15	0.0%
Hang Seng	22727	22620	107	0.5%
Gift Nifty	22977	22949	28	0.1%
Straits Singapore	3890	3878	13	0.3%
South Korea	2610	2591	19	0.7%
Taiwan	23407	23153	254	1.1%
Shanghai	3352	3347	5	0.2%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9477	9485	(8)	-0.1%
Alumin (\$/MT)	2638	2604	34	1.3%
Zinc (\$/MT)	2843	2846	(3)	-0.1%
Brent Crude (\$/bbl)	75	75	0	0.0%
Gold (\$/Ounce)	2899	2883	16	0.6%
Silver (\$/Ounce)	32	32	0	0.9%
Light Crude (\$/bbl)	71	71	(0)	-0.1%
N G (\$/mmbtu)	4	4	(0)	-2.8%
Sugar (\$/MT)	538	529	8	1.5%
Rubber (Rs./kg)	190	190	0	0.0%
Baltic Dry Index	792	780	12	1.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	86.83	86.91	-0.09%
Rs./ Euro	91.00	90.58	0.47%
Rs./Chinese Yuan	11.96	11.91	0.35%
Yen /\$ rate	151.56	152.31	-0.49%
\$ US/Euro	1.05	1.05	0.09%

Dollar Index	Current	Previous	Var(%)
Dollar Index	106.68	106.71	-0.03%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22840	49000
Support 2	22770	48740
Resistance	23000	49540

Securities in Ban For Trade
DEEPAKNTR

**Market Review**

**US:** Wall Street stocks ended mixed on Friday, with Nvidia climbing and Microsoft dipping, while Treasury yields declined a day after US President Donald Trump unveiled reciprocal tariff plans but stopped short of imposing new ones.

**Asia:** Asia-Asian stocks are set to come under pressure early Monday as traders navigate increasing tensions between the US and European Union and looming central bank monetary policy decisions.

**India:** The Indian equity benchmark indices closed lower on Friday, registering their longest losing streak in two years.

**Market is expected to open on a flattish note and likely to witness range bound move during the day.**

**Global economy:** Japan's economy grew 2.8% in the October-December quarter, exceeding forecasts, driven by strong business spending and domestic demand. Private consumption rose 0.1%, while capital spending increased 0.5%. The positive growth supports the Bank of Japan's plans to raise interest rates, though concerns over price pressures and sluggish consumer spending persist.

Peru's trade surplus widened to USD 2,333 Mn in Dec 2024, up from USD 2,246 Mn last year. Exports rose 9.2% YoY to USD 6,986 Mn, driven by a 15.4% increase in non-traditional and 6.9% in traditional products. Imports grew 12.1% to USD 4,653 Mn, mainly due to higher consumer goods (19%), raw materials (13.4%), and capital goods (5.5%).

New Zealand's visitor arrivals surged 12.2% year-on-year to 469,842 in December 2024, the highest since 2019. Annual arrivals reached 3.31 million, driven by increases from Australia, China, and the U.S., reflecting strong post-pandemic recovery.

**Commodities:** Oil declined on the prospect of increased flows from Iraq and Russia, as US President Donald Trump pushes to end the three-year old war in Ukraine.

Gold steadied following its largest one-day decline in two months, with the slump sparked by investor concern that the metal's recent record-breaking rally may have been overdone.

**Currency:** The yen rose on Monday in a boost from upbeat Japanese GDP data, while the Australian and New Zealand dollars held broadly steady ahead of policy decisions later in the week. The dollar was on the back foot as traders assessed recent weaker-than-expected U.S. economic data which have reignited bets for more Federal Reserve rate cuts this year.

**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	23709	3829	29459	4688	(859)	275743	43856	268957	43199	6786	657
Index Option	3754651	634639	3706174	626868	7771	2097358	343883	1802999	295695	294359	48188
Stock Future	326870	19408	316113	18922	486	5803672	346355	5768609	348942	35063	(2587)
Stock Option	1427382	89240	1481519	91935	(2695)	1558999	89038	1459766	85068	99233	3970
<b>Total</b>	<b>5532612</b>	<b>747116</b>	<b>5533265</b>	<b>742413</b>	<b>4703</b>	<b>9735772</b>	<b>823132</b>	<b>9300331</b>	<b>772904</b>	<b>435441</b>	<b>50228</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
7-Feb-25	12962	13434	(473)
10-Feb-25	10173	12471	(2297)
11-Feb-25	12429	16518	(4089)
12-Feb-25	13009	17885	(4876)
13-Feb-25	12933	15129	(2196)
<b>Month to date- Feb</b>	<b>123539</b>	<b>144810</b>	<b>(21271)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
10-Feb-25	9608	12072	(2464)
11-Feb-25	11496	15982	(4486)
12-Feb-25	12389	17358	(4969)
13-Feb-25	12124	14914	(2790)
14-Feb-25	9064	13359	(4295)
<b>Month to date-Feb</b>	<b>126345</b>	<b>155528</b>	<b>(29183)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
10-Feb-25	9802	8287	1516
11-Feb-25	13788	9786	4002
12-Feb-25	15357	9428	5929
13-Feb-25	13148	10214	2935
14-Feb-25	12827	8463	4364
<b>Month to date-Feb</b>	<b>149201</b>	<b>123182</b>	<b>26019</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
7-Feb-25	1110	362	748
10-Feb-25	250	2357	(2107)
11-Feb-25	3078	5619	(2541)
12-Feb-25	1506	2500	(994)
13-Feb-25	630	5653	(5022)
<b>Month to date- Feb</b>	<b>18150</b>	<b>20322</b>	<b>(2172)</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	629	15%	387	13%
Decline	3386	83%	2455	85%
Unchanged	68	2%	41	1%

Market Turnover	14-Feb	13-Feb	Var (%)
BSE Cash	5491	4676	17%
NSE Cash	85658	84395	1%
NSE Futures	121435	105765	15%
NSE Options	13161572	44918798	-71%
<b>Total (Rs.Cr)</b>	<b>13374156</b>	<b>45113634</b>	<b>-70%</b>

Volatility Index	14-Feb	13-Feb
Volatility Index	15.02	14.96

Index PE - TTM	14-Feb	Yr. High	Yr. Low
Sensex	21.1	25.7	21.1
Nifty	20.4	24.4	20.4

**Corporate News**

**JSW's KSK Mahanadi bid gets NCLT nod**

The Hyderabad bench of the NCLT approved the Rs 16,084 cr resolution plan submitted by JSW Energy Limited for KSK Mahanadi Power Company Limited, a Chhattisgarh-based thermal power company. (TIE)

**Uno Minda to acquire remaining 49.9 pc stake in JV firm for Rs 195 cr**

Uno Minda has announced plans to acquire the remaining 49.9% stake in joint venture UnoMinda EV Systems from FRIWO Geratebau GmbH for Rs 195 cr. The acquisition aims to consolidate its position in the Indian electric vehicle market and integrate e-drive business technologies from Germany and Vietnam by Q1FY26. (ET)

**BHEL bags Rs 6,700 cr order from Singareni Collieries**

BHEL has secured a 6,700 cr order from Singareni Collieries Company to develop an 800 MW thermal power unit in Telangana. The project, based on EPC (Engineering, Procurement & Construction), will be established next to existing units, with BHEL handling design, manufacturing, and commissioning. (ET)

**Economy**

**India-US to seal first trade deal tranche by fall, aiming for \$500 bn target**

India and the United States aim to finalize the first phase of a Bilateral Trade Agreement by fall, focusing on increased market access and reducing trade barriers. This agreement, part of 'Mission 500', seeks to double bilateral trade to \$500 bn annually by 2030 while enhancing supply chain integration and investment opportunities.(ET)

**Wholesale inflation eases to 2.3% in January**

India's wholesale price inflation eased to 2.3% in January, helped by a correction in food prices and a decline in fuel and power prices. Retail inflation also dropped, with vegetable prices significantly falling. (ET)

**International**

**Amazon North Carolina workers reject union, handing retailer win in labor fight**

Amazon workers in North Carolina voted against joining a union, a big win for the retail giant which has vigorously opposed organized labor at its facilities across the United States. About three-quarters of voters were opposed, marking a setback for union officials who have long coveted Amazon because of how many industries it touches, including warehousing, trucking, manufacturing and even data processing. (Inv)

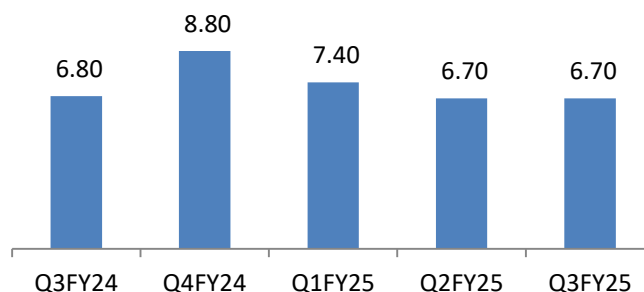
Top 5 Nifty Gainers	14-Feb	13-Feb	Var(%)
BRITANNIA	4940	4889	1.0%
ICICIBANK	1260	1249	0.9%
NESTLEIND	2196	2178	0.8%
INFY	1856	1843	0.7%
TCS	3935	3910	0.6%
Top 5 Nifty Losers	14-Feb	13-Feb	Var(%)
ADANIPTS	1063	1112	-4.4%
BEL	250	262	-4.3%
ADANIENT	2153	2245	-4.1%
TRENT	5117	5257	-2.7%
SUNPHARMA	1701	1746	-2.6%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	75939	-0.3%	-2.5%	-0.9%	4.8%
MIDCAP	39732	-2.6%	-7.7%	-9.2%	-0.5%
SMLCAP	45411	-3.2%	-9.5%	-13.2%	-0.5%
AUTO	49313	-1.4%	-6.4%	-4.2%	4.9%
BANKEK	55825	-0.5%	-1.7%	1.6%	6.1%
Capital Goods	57349	-2.8%	-6.1%	-12.0%	2.4%
FMCG	19233	-0.4%	-4.1%	-5.4%	-0.4%
Health Care	39887	-2.8%	-7.6%	-6.5%	12.4%
IT	40577	-0.1%	-3.9%	-2.8%	3.9%
METAL	27621	-1.6%	-4.5%	-3.8%	0.0%
Oil & Gas	23352	-1.7%	-6.3%	-10.5%	-19.2%
Power	5826	-2.7%	-7.0%	-13.0%	-10.6%
Realty	6484	-2.0%	-9.4%	-12.3%	-7.0%

NSE USD Futures	14-Feb	13-Feb	Var (%)
Feb Expiry (Rs./\$)	84.86	84.86	0.0%
Mar Expiry (Rs./\$)	84.83	84.83	0.0%
Total Turnover (Rs. Crore)	2809	2688	5%

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

**Dalmia Bharat quarterly sales volume in Mnt**  
(Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
<b>US</b>	4.48%	4.48%	0 bps
<b>Japan</b>	1.38%	1.36%	1 bps
<b>India</b>	6.71%	6.71%	(0) bps
<b>UK</b>	4.50%	4.49%	1 bps
<b>Libor 3 Mths</b>	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	638	638	0.0%
Inflation - WPI	1.89%	2.36%	(47) bps
Inflation - CPI	5.22%	5.48%	(26) 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)	-2472	-2049	(423.7)

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	7038141	21.74	9916734	-0.78%	1	1872.87	1856.40	0.9%
Wipro	3.63	3800045	3.63	4095301	0.00%	1	315.18	308.10	2.3%
Dr.Reddy's	13.60	1802133	13.99	2497322	-2.79%	1	1180.85	1197.05	-1.4%
ICICI Bank	29.16	3987376	29.15	5340110	0.03%	2	1265.94	1260.10	0.5%
HDFC Bank	60.23	2209389	60.17	4027554	0.10%	3	1743.21	1694.85	2.9%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	37.20	37.70	(0.5)	-1.3%
RIL	56.00	56.20	(0.2)	-0.4%
SBI	83.50	83.80	(0.3)	-0.4%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.90%	2.70%
Unemployment (%)	4.00%	4.10%

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 (%)	0.50%	0.10%

Economic Calendar

	Date
Indian GDP Data	28 Feb
Indian Inflation Data CPI	12 Mar
Indian Inflation Data WPI	14 Feb
Indian Monetary Policy	To be announced
India's Industrial Production (IIP)	12 Mar
US Inflation Data	12 Mar
US GDP	27 Feb
US Unemployment Data	07 Mar
US Fed Rate	19 Mar
China GDP	16 Apr
China Inflation Data	09 Mar

Event Update

Name	Date	Purpose
Apollo Sindoori Hotels Ltd.	17/02/25	Dividend
Artemis Electricals And Projects Ltd.	17/02/25	Rs.0.0050 per share(0.5%)Interim Dividend
Campus Activewear Ltd.	17/02/25	Rs.0.70 per share(14%)Interim Dividend
Capital India Finance Ltd.	17/02/25	Stock Split from Rs.10/- to Rs.2/-
Dalmia Bharat Sugar And Industries Ltd.	17/02/25	Rs.4.50 per share(225%)Interim Dividend
Garuda Construction & Engineering Ltd.	17/02/25	Rs.0.0250 per share(0.5%)Interim Dividend
IIFL Capital Services Ltd.	17/02/25	Rs.3.00 per share(150%)Interim Dividend
Ircon International Ltd.	17/02/25	Rs.1.65 per share(82.5%)Interim Dividend
Mrs. Bectors Food Specialities Ltd.	17/02/25	Rs.3.00 per share(30%)First Interim Dividend
Oil India Ltd.	17/02/25	Rs.7.00 per share(70%)Second Interim Dividend
Premco Global Ltd.	17/02/25	Rs.2.00 per share(20%)Third Interim Dividend
Amrutanjan Health Care Ltd.	18/02/25	Rs.1.00 per share(100%)Second Interim Dividend
Bharat Forge Ltd.	18/02/25	Rs.2.50 per share(125%)Interim Dividend
East India Drums And Barrels Manufacturing Ltd.	18/02/25	Interim Dividend
Fineotex Chemical Ltd.	18/02/25	Rs.0.40 per share(20%)Interim Dividend
Greenpanel Industries Ltd.	18/02/25	Rs.0.30 per share(30%)Interim Dividend
Hindustan Aeronautics Ltd.	18/02/25	Rs.25.00 per share(500%)First Interim Dividend
Honda India Power Products Ltd.	18/02/25	Rs.10.00 per share(100%)Special Dividend
IOL Chemicals And Pharmaceuticals Ltd.	18/02/25	Rs.4.00 per share(40%)Interim Dividend
Kothari Products Ltd.	18/02/25	Bonus issue
KP Energy Ltd.	18/02/25	Rs.0.20 per share(4%)Third Interim Dividend
KPI Green Energy Ltd.	18/02/25	Third Interim Dividend
KSE Ltd.	18/02/25	Rs.30.00 per share(300%)First Interim Dividend
Natco Pharma Ltd.	18/02/25	Rs.1.50 per share(75%)Third Interim Dividend
NBCC (India) Ltd.	18/02/25	Rs.0.53 per share(53%)Interim Dividend
NCL Industries Ltd.	18/02/25	Rs.1.00 per share(10%)Interim Dividend
Precision Wires India Ltd.	18/02/25	Rs.0.30 per share(30%)Interim Dividend
Saven Technologies Ltd.	18/02/25	Rs.1.50 per share(150%)Interim Dividend



**Bulk Deal As On 14/02/25**

**BSE**

Security Code	Security Name	Client Name	Deal	Quantity	Price
539800	CHDCHEM	KANUMURI MURALI KRISHNA CHOUDHURY	S	51460	5.67
531099	CHECKPOINT	KARTIK SUNIL JAIN	S	65000	15.52
531099	CHECKPOINT	RAJVANSH ELECTRICALS PRIVATE LIMITED	B	161000	15.52
512361	CUPIDALBV	ANANDPRAKASHMISHRA	B	5000	133.85
512361	CUPIDALBV	GREEN PEAKS ENTERPRISES LLP	S	5000	132.66
539770	DARJEELING	VARSHA CHUGH	S	50000	27.01
532092	EPUJA	SPS FINQUEST PRIVATE LIMITED	B	414462	5
544332	FABCLEAN	SEEMA DILIP VORA	B	120000	290.95
539032	FRASER	PRASHANT UPADHYAY	S	106893	10.49
539032	FRASER	YAKSHIT FINANCE LIMITED	B	122707	10.49
508980	FRONTCAP	SACHINBHANUBHAIMANSETA	S	200000	21.54
544348	GBLOGISTIC	RAJESH NANUBHAI JHAVERI HUF	S	99600	45.72
531913	GOPAIST	EWART PROMOTER HOLDINGS PRIVATE LIMITED	B	28026	7.08
524590	HEMORGANIC	SANJAY KARANRAJ SAKARIA	B	30000	11.6
524590	HEMORGANIC	VISHNUDATT GANGASAHAY GUPTA	S	19644	11.6
531301	HIGHSTREE	PACE STOCK BROKING SERVICES PVT LTD	S	3561	142.8
530145	KISAN	APOLLO PIPES LIMITED	B	600000	48
511658	NETTLINX	MANOHAR REDDY LOKA	S	268307	97
530805	OIVL	HARSHA RAJESHBHAI JHAVERI	S	224461	8.94
530805	OIVL	SANDIP JAYSHUKHLAL SHAH	S	900000	8.94
530805	OIVL	VANRAJ DADBHAI KAHOR	S	356533	8.94
530805	OIVL	YAKSHIT FINANCE LIMITED	B	1690586	8.94
531512	ORIENTTR	KANAK INNOVATIVE LLP	B	81251	32.98
540198	OSIAJEE	MANISH KUMAR	B	49590	100.82
540198	OSIAJEE	URJA INVESTMENT PRIVATE LIMITED	S	49590	100.82
526381	PATINTLOG	ARHAAN NUMAIRE FAMILY BENEFICIARIES TRUST	B	420000	17.25
526381	PATINTLOG	REZAN NIKITA FAMILY BENEFICIARIES TRUST	S	420000	17.25
512591	PULSRIN	GILANI INFRA PRIVATE LIMITED	S	221193	17.51
512591	PULSRIN	GILANI INFRA PRIVATE LIMITED	B	600000	17
512591	PULSRIN	JIGNASHA RATHAVA	S	87572	17.52
512591	PULSRIN	NIRAJ RAJNIKANT SHAH	S	384577	17.09
512591	PULSRIN	NIRAJ RAJNIKANT SHAH	B	100000	17.53
512591	PULSRIN	PRASHANT GUPTA	S	360000	17.39
512591	PULSRIN	PRASHANT GUPTA	B	360000	16.92
512591	PULSRIN	SHAILESH DHAMELIYA	B	1132661	17.27
512591	PULSRIN	SHAILESH DHAMELIYA	S	1105039	17.25
530525	RRETAIL	BLACKBERRY SAREES PRIVATE LIMITED	B	857814	10.31
540081	SABEVENTS	ATUL KUMAR BANSAL	S	71364	4.45
539117	SUJALA	CHAUBARA EATS PRIVATE LIMITED	S	46686	75.55
539117	SUJALA	KANAK INNOVATIVE LLP	B	62000	75.55
539040	TTIL	NIRAJ RAJNIKANT SHAH	B	130623	10.47
540083	TVVISION	INDIAN OVERSEAS BANK	S	680180	3.84
506122	VOLKAI	GUTTİKONDA RAJASEKHAR	S	6158	237.19
506122	VOLKAI	SUDHANSHU KANDA	S	211	250.34
506122	VOLKAI	SUDHANSHU KANDA	B	4675	237.1
531663	YUVRAAJHPL	ARUN KUMAR MUKHERJEE	B	999999	9.51

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
CEWATER	Concord Enviro Systems L	PGIM INDIA EQUITY GROWTH OPPORTUNITIES FUND SERIES I	SELL	160000	529.9
GLOBALPET	Global Pet Industries Ltd	MILAN GIRISH KOTADIA	BUY	66000	120.31
MOKSH	Moksh Ornaments Limited	PINE OAK GLOBAL FUND	SELL	614536	12.94
MOKSH	Moksh Ornaments Limited	VINCENT COMMERCIAL COMPANY LIMITED	BUY	615000	12.94
MONOPHARMA	Mono Pharmacare Limited	NIRAJ RAJNIKANT SHAH	SELL	326000	25.25
RAJMET	Rajnandini Metal Limited	SURENDER SHARMA	SELL	1750000	6.71
SABEVENTS	Sab Events & Governance	INDIAN OVERSEAS BANK	SELL	156949	3.71
SABEVENTS	Sab Events & Governance	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	69984	3.69
SIKKO	Sikko Industries Limited	REDOX INDUSTRIES LIMITED	BUY	130000	70.91
WEWIN	WE WIN LIMITED	DEEPINDER SINGH POONIAN	SELL	66016	60.58

**Disclosure:**

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