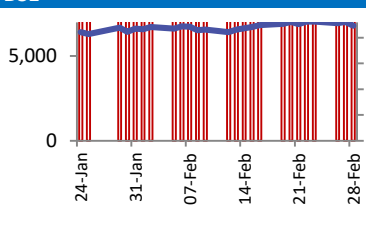
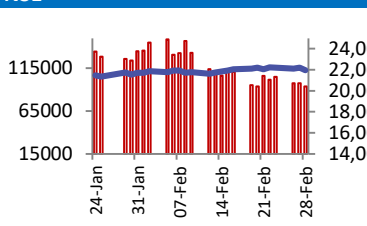


BSE		NSE	
	70,000 Open 65,000 High 60,000 Low 55,000 Close 50,000		24,000 Open 22,000 High 20,000 Low 18,000 Close 16,000
	Change -790		Change -247
	Volume (Lacs) 10420		Volume(Lacs) 54118
	Turnover (Rs.inCr) 7103		Turnover(Rs.in Cr) 93572

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	38949	38972	(23)	-0.1%
Dow Futures	38960	38993	(33)	-0.1%
Nasdaq	15948	16035	(88)	-0.5%
FTSE	7625	7683	(58)	-0.8%
Nikkei	38953	39208	(255)	-0.6%
Hang Seng	16668	16537	131	0.8%
Gift Nifty	21937	21954	(17)	-0.1%
Straits Singapore	3137	3139	(2)	-0.1%
South Korea	2643	2652	(9)	-0.3%
Taiwan	18890	18854	36	0.2%
Shanghai	2995	2958	37	1.2%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8449	8474	(25.5)	-0.3%
Alumin (\$/MT)	2191	2192	(1.0)	0.0%
Zinc (\$/MT)	2415	2422	(7.5)	-0.3%
Brent Crude (\$/bbl)	83.6	83.7	(0.1)	-0.1%
Gold (\$/Ounce)	2037	2035	2.1	0.1%
Silver (\$/Ounce)	22.5	22.5	0.1	0.3%
Light Crude (\$/bbl)	78.4	78.5	(0.1)	-0.1%
N G (\$/mmbtu)	1.9	1.9	(0.0)	-1.2%
Sugar (\$/MT)	635.0	631.7	3.3	0.5%
Rubber (Rs./kg)	167.0	167.0	0.0	0.0%
Baltic Dry Index	2041	1899	142.0	7.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	82.93	82.90	0.04%
Rs./ Euro	89.56	89.98	-0.46%
Rs./Chinese Yuan	11.53	11.52	0.03%
Yen /\$ rate	149.80	150.69	-0.59%
\$ US/Euro	1.08	1.08	-0.02%

Dollar Index	Current	Previous	Var(%)
Dollar Index	103.86	103.98	-0.11%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	21840	45500
Support 2	21670	45140
Resistance	22040	46500

Securities in Ban For Trade	
INDUSTOWER	SAIL

Market Review

US: US PCE index, Federal Reserve's preferred inflation gauge, is scheduled for release later today, which will provide clues for the central bank's monetary policy going ahead. China's official PMI reading is due to be released on Friday, which will provide further insight into the economy struggling to reel out of the pandemic's effect. The S&P 500 Index and Nasdaq Composite fell by 0.17% and 0.55%, respectively on Wednesday. The Dow Jones Industrial Average fell by 0.06%.

Asia: Share indices in Asia-Pacific region were trading lower in early trade on Thursday, taking cues from overnight losses on Wall Street as market participants await for U.S. Personal Consumption Expenditure and China's PMI data.

India: India's benchmark equity indices closed over 1% lower on Wednesday as Reliance Industries Ltd. and bank stocks dragged the most. The NSE Nifty 50 ended 247.20 points or 1.11%, down at 21,951.15 and the S&P BSE Sensex closed 790.34 points or 1.08%, lower at 72,304.88. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

Global Economy: Japan's January factory output fell at the fastest pace since May 2020, as a production downturn in motor vehicles adds to concerns about the fragility of an economy that slipped into recession late last year. Industrial output fell 7.5% in January from the previous month, data from the Ministry of Economy, Trade and Industry (METI) showed. It was slightly worse than the median market forecast for a 7.3% drop, with output sliding in 14 of the 15 industries surveyed by METI.

Australian retail sales rebounded in January after a slump the previous month, though annual growth in spending remained anaemic as high interest rates ate into spending power. Data from the Australian Bureau of Statistics (ABS) on Thursday showed retail sales rose 1.1% in January from December, when it dived a revised 2.1%.

Commodities: Gold prices held ground on Thursday as traders awaited the Federal Reserve's preferred inflation gauge due later in the day that could provide a fresh perspective into when the U.S. central bank could start cutting interest rates.

Oil prices eased early on Thursday after a larger-than-expected build in U.S. crude stockpiles stoked worries about slow demand, while signs that U.S. interest rates could remain elevated for longer also added to pressure.

Currency: The US dollar was firm ahead of the key inflation data that could ruffle the interest rate outlook.

FII Derivative Transactions (Rs. Cr)

Contracts	Purchase		Sell		Net Value	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value		Contract	Value	Contract	Value	Contract	Value
Index Future	101002	8237	103927	8480	(243)	313683	27652	311710	27655	1973	(3)
Index Option	32461564	2677944	32855416	2709051	(31107)	5910437	519618	4650175	410176	1260262	109442
Stock Future	872808	70572	877807	71207	(635)	3201703	256630	3177678	259442	24025	(2812)
Stock Option	291857	25036	290037	24648	388	364883	31177	459519	39505	(94636)	(8328)
Total	33727231	2781789	34127187	2813386	(31597)	9790706	835077	8599082	736778	1191624	98299

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
21-Feb-24	17007	16614	394
22-Feb-24	14613	14801	(188)
23-Feb-24	15622	14071	1552
26-Feb-24	12512	12768	(256)
27-Feb-24	18357	16301	2056
Month to date-Feb	277315	276127	1187
FII (Prov.) (Rs Cr)	Buy	Sell	Net
22-Feb-24	14377	15787	(1410)
23-Feb-24	15747	14471	1276
26-Feb-24	12525	12810	(285)
27-Feb-24	16401	17910	(1509)
28-Feb-24	11059	12938	(1879)
Month to date- Feb	291286	310817	(19531)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
22-Feb-24	10473	8649	1824
23-Feb-24	8556	8380	177
26-Feb-24	8527	8532	(5)
27-Feb-24	11803	8942	2862
28-Feb-24	10125	8298	1827
Month to date-Feb	229077	203467	25610
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
21-Feb-24	1111	1608	(497)
22-Feb-24	1273	776	497
23-Feb-24	2440	1207	1233
26-Feb-24	1032	460	572
27-Feb-24	1507	327	1180
Month to date-Feb	38731	19748	18983

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	844	22%	402	15%
Decline	3002	77%	2149	83%
Unchanged	75	2%	49	2%

Market Turnover	28-Feb	27-Feb	Var (%)
BSE Cash	7103	9699	-27%
NSE Cash	93572	97555	-4%
NSE Futures	294880	308175	-4%
NSE Options	33607562	40383918	-17%
Total (Rs.Cr)	34003117	40799346	-17%

Volatility Index	28-Feb	27-Feb
Volatility Index	16.33	15.73

Index PE - TTM	28-Feb	Yr. High	Yr. Low
Sensex	24.7	26.0	21.8
Nifty	22.7	28.8	20.0

Corporate News

Reliance, Disney To Merge Indian Media Businesses To Create Rs 70,352-Crore JV

Reliance Industries Ltd. will merge its television and streaming business with Walt Disney Co.'s India unit to create the country's largest media company valued at Rs 70,352 crore. The Mukesh Ambani-promoted company will control the joint venture via a 16.34% direct stake and 46.82% held through Viacom 18. Disney will own 36.84%. (BQ)

Coal India To Hold 51% Stake In Rs 11,700 Crore Coal-To-Chemical JV With BHEL

Coal India Limited on Wednesday said it will hold a 51% stake in the joint venture with Bharat Heavy Electricals Limited for the coal-to-chemicals project in Odisha. "To form a JV company to undertake coal-to-chemicals business by initially setting up a Coal to 2000 tons per day Ammonium Nitrate Plant using BHEL's in-house developed Pressurized Fluidized Bed Gasification technology," the company informed the bourses. Equity shareholding shall be 51% with CIL and 49% with BHEL. (BQ)

NTPC Green Energy, MAHAGENCO To Set Up JV For Renewable Energy Parks In Maharashtra

NTPC Green Energy Ltd has signed a pact with Maharashtra State Power Generation Company Ltd to set up a joint venture company to develop renewable energy parks in Maharashtra, a statement said on Wednesday. The JV Company shall develop GW-scale RE park and projects in a phased manner, thereby realizing the green energy objectives of NTPC and the GOI's efforts towards energy transition. NTPC Green Energy Ltd is a subsidiary of state-run power major NTPC. (BQ)

Economy

Indian Economy Remains Resilient, Says NCAER Report

High frequency indicators reveal that the Indian economy remains resilient with Purchasing Manager's Index for services accelerating and manufacturing regaining momentum, economic think tank National Council of Applied Economic Research said in report released on Wednesday. Further, NCAER said the composite PMI accelerated to 61.2 in January from 58.5 in December 2023. (BQ)

International

AB InBev, Teamsters reach tentative agreement to avert US strike

Anheuser-Busch Inbev and the Teamsters union said on Wednesday they have reached a 5-year tentative agreement that would avert a strike at the world's largest brewer's U.S. facilities. Union members will receive wage increases of \$8/hour, including an immediate \$4/hour raise in the first year, along with a \$2,500 ratification bonus for all members as part of the agreement, Teamsters said in a statement. (Inv)

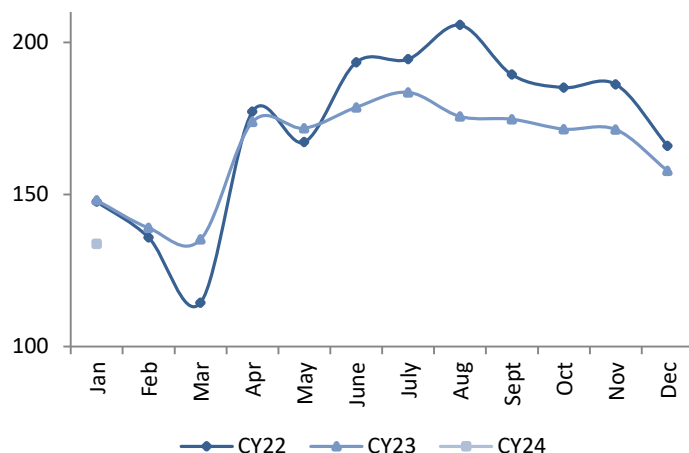
Top 5 Nifty Gainers	28-Feb	27-Feb	Var(%)
HINDUNILVR	2422	2405	0.7%
INFY	1671	1664	0.5%
TCS	4119	4104	0.4%
BHARTIARTL	1129	1128	0.1%
0	0	0	#DIV/0!
Top 5 Nifty Losers	28-Feb	27-Feb	Var(%)
POWERGRID	280	293	-4.4%
APOLLOHOSP	6362	6621	-3.9%
EICHERMOT	3864	4003	-3.5%
BAJAJ-AUTO	8189	8464	-3.2%
MARUTI	11153	11501	-3.0%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	72305	-1.1%	-0.4%	0.8%	22.6%
MIDCAP	39019	-1.8%	-1.1%	0.6%	61.5%
SMLCAP	44998	-1.9%	-1.2%	-1.6%	64.6%
AUTO	46732	-2.0%	0.4%	6.2%	59.9%
BANKEX	52223	-1.3%	-2.2%	0.4%	14.5%
Capital Goods	57046	-1.1%	3.6%	0.6%	68.5%
FMCG	19396	-0.9%	-0.2%	-2.5%	20.0%
Health Care	35318	-1.0%	-0.8%	4.4%	63.5%
IT	38345	-0.4%	0.9%	2.6%	30.4%
METAL	26667	-1.8%	-1.7%	-0.3%	40.5%
Oil & Gas	27635	-2.2%	-3.3%	6.6%	63.4%
Power	6524	-2.3%	0.1%	3.3%	97.9%
Realty	7182	-2.1%	0.5%	6.1%	127.8%

NSE USD Futures	28-Feb	27-Feb	Var (%)
Feb Expiry (Rs./\$)	82.92	82.89	0.0%
March Expiry (Rs./\$)	82.93	82.90	0.0%
Total Turnover (Rs. Crore)	22646	37295	-39%

Sectors	TTM PE
Auto	30.69
Auto Ancillary	44.77
Banking	15.97
Engineering	43.34
Cement	40.38
Diamonds & Jewellery	80.68
Housing Finance	20.21
Infrastructure & Const	41.26
Metals-Aluminium	18.66
Metal - Steel	16.65
Oil Expl.	12.78
Pharma	47.09
Power – Gen. Supp.	20.71
Information Tech.	34.67
Sugar	15.63
Telecom Serv. Prov.	75.22
Tyres	28.7

All India Tea Prices (Rs/Kg) (Source: teaboard.gov.in)



10 year G-Sec Yield	Current	Previous	Change
US	4.27%	4.26%	1 bps
Japan	0.71%	0.70%	1 bps
India	7.07%	7.07%	(0) bps
UK	4.19%	4.20%	(1) bps
Libor 3 Mths	5.60%	5.60%	1 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation - WPI	0.27%	0.73%	(46) bps
Inflation - CPI	5.10%	5.69%	(59) bps

India GDP	Q2FY24	Q1FY24	Var(%)
Growth	7.60%	7.80%	(20) bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.50%	6.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.50%	4.50%	0 bps
O/S Banking System Liquidity (Rs bn)	-1455	-1869	414.4

IIP Growth %	Dec-23	Dec-22	YTD
IIP	3.8	5.1	5.8
Mining	5.1	10.1	8.6
Manufacturing	3.9	3.6	5.6
Electricity	1.2	10.4	6.3

Bulk Deal As On 28/02/24

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539528	AAYUSH	AVANCE VENTURES PRIVATE LIMITED	S	25000	123.33
539277	ALSTONE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	6654271	0.85
531017	ARISE	SANDEEP SALUJA	B	27200	22.98
539662	BFLAFL	FUTURISTIC PRIME DEVELOPERS PRIVATE LIMITED	S	70002	22.73
539662	BFLAFL	JAI VINAYAK SECURITIES	S	87023	22.64
539662	BFLAFL	JAI VINAYAK SECURITIES	B	92024	23
539662	BFLAFL	NANDAN KANAN BARTER PVT LTD	S	347053	20.55
539662	BFLAFL	NIRANJANA SPACE PRIVATE LIMITED	S	51070	21.94
539662	BFLAFL	TRADESWIFT DEVELOPERS PRIVATE LIMITED	S	245401	23.99
543209	BILLWIN	TALIB ZAFAR	B	12000	66.53
543439	BRANDBUCKT	JR SEAMLESS PRIVATE LIMITED	B	128000	16.33
543439	BRANDBUCKT	SANKET RAMESH FUKE	S	146000	16.33
530249	BRIDGESE	HARSHAD AMRUTLAL PANCHAL	B	38369	20.89
530249	BRIDGESE	MALLIKA RATHI	S	20000	20.9
530249	BRIDGESE	RAJNISH RATHI	S	20000	20.9
504340	CONFINT	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	105258	10.64
543594	DPL	F3 ADVISORS PRIVATE LIMITED	S	147000	11.24
543594	DPL	F3 ADVISORS PRIVATE LIMITED	B	6000	11.25
531911	GALAGEX	MANUBHAI AMRUTLAL SHAH	S	40603	48.89
531911	GALAGEX	SHAKUNTALA SURESH SHAH	B	16000	48.13
512443	GANONPRO	HARISH KUMAR	S	70000	11.28
512443	GANONPRO	PRITI DEVI	S	70000	11.29
512443	GANONPRO	URVASHI UMESHBHAI PATEL	S	46730	11.3
512443	GANONPRO	URVASHI UMESHBHAI PATEL	B	49817	11.26
539041	GANVERSE	ANCHAL BANSAL	S	57500	91.36
539041	GANVERSE	ANCHAL BANSAL	B	50000	90.31
539041	GANVERSE	SRINIVASULU VEERA BOYINA	B	107500	92.58
543239	GMPL	CREDENT INVESTMENT PRIVATE LIMITED	S	70000	186.23
513309	GOLKONDA	GRID TRADING PRIVATE LIMITED	B	251800	18.7
513309	GOLKONDA	MEHUL MAHENDRA SHAH	S	7000	18.69
513309	GOLKONDA	MEHUL MAHENDRA SHAH	B	27000	18.7
513309	GOLKONDA	NIKHIL RAJESH SINGH	S	127760	18.7
513309	GOLKONDA	NIKHIL RAJESH SINGH	B	64936	18.65
513309	GOLKONDA	UTPAL AGRAWAL	S	250000	18.7
530469	GSLSEC	DORNI VINIMOY PRIVATE LIMITED	S	25000	13.08
543546	HEALTHYLIFE	WEALTH FIRST PORTFOLIO MANAGERS PVT LTD.	S	300000	4.07
530255	KAYPOWR	MABLE RAJESH	S	55000	40.65
530255	KAYPOWR	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	96062	40.65
543289	KGES	AMIT JUGRAJ JAIN	B	12000	16.25
505523	MAHACORP	BHAVYA DHIMAN	S	7350000	1.64
505523	MAHACORP	NIKHIL RAJESH SINGH	S	8854402	1.64
505523	MAHACORP	NIKHIL RAJESH SINGH	B	7560992	1.64
539938	MIL	MEHTA ATULKUMAR AMRITLAL HUF	S	90000	63.27
531834	NATHUEC	HAL CLYDE DENISON LIMITED	S	43076	7.17
538742	PANABYTE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	23627	25.17
530095	PRADHIN	ARUNABEN VINODCHANDRA DHANDHARA	B	20000	52.44
530095	PRADHIN	ASHISHBHAI JASHWANTBHAI DESAI HUF	S	28600	52.44
541703	RACONTEUR	ANILKUMAR	B	24000	25.67
541703	RACONTEUR	ANNAYA MANAGEMENT CONSULTANCY PRIVATE LIMITED .	S	203200	26.6

541703	RACONTEUR	GRISHMA VIRAL JHAVERI	S	19200	26.99
541703	RACONTEUR	GRISHMA VIRAL JHAVERI	B	19200	25.9
541703	RACONTEUR	NITESH LAHARWANI	B	16000	26.8
541703	RACONTEUR	OASIS CAPITAL SERVICES PRIVATE LIMITED	B	40000	26.94
541703	RACONTEUR	SHREYA SHARMA	B	22400	26.6
540147	SHASHIJIT	SW CAPITAL PRIVATE LIMITED	S	628413	6
540147	SHASHIJIT	SW CAPITAL PRIVATE LIMITED	B	5164	5.99
543924	SONALIS	ALKESHKUMAR JAYANTILAL PATEL	B	10000	37.86
514248	SRECR	SATYA PRAKASH MITTAL	S	100	89.99
514248	SRECR	SATYA PRAKASH MITTAL	B	23600	92.56
532879	SSLEL	LEKHRAJ PARASMALJI KANUNGO	B	26769	375.2
532879	SSLEL	VORA FINANCIAL SERVICES PVT LTD	S	30000	375.2
511447	SYLPH	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	1271942	4.48
511447	SYLPH	SRESTHA FINVEST LIMITED	S	756762	4.57
511447	SYLPH	SRESTHA FINVEST LIMITED	B	860080	4.53
539310	THINKINK	MUNISH KUMAR	B	183763	78.51
539310	THINKINK	TUSHARKUMAR ASHOKBHAI SOLANKI	S	182763	78.15
533629	TIJARIA	GREEN PEAKS ENTERPRISES LLP	S	67043	10.55
533629	TIJARIA	GREEN PEAKS ENTERPRISES LLP	B	237859	10.55
519367	TRANSFD	PUJARI GEETA	B	877	117.57
519367	TRANSFD	SHAVETA DAWAR	B	1000	117.6
541358	UCIL	ASHISH GOYAL	B	39426	41.52
541358	UCIL	RITA FINANCE AND LEASING LIMITED	S	44400	41.52
541358	UCIL	SANJAY AGGARWAL	S	40000	41.52
541358	UCIL	VIKAS GOYAL	B	45000	41.52
541338	UHZAVERI	VINABHEN ATULKUMAR SHAH	S	53802	53.71
513397	VALLABHSQ	PUNJABHAI KESHAVBHAI JADEJA	S	29800	13.47
511523	VEERHEALTH	ABHINAVGOSWAMI	B	188834	24.32

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ACL	Andhra Cements Limited	SETU SECURITIES PRIVATE LIMITED	SELL	500000	104.48
APTUS	Aptus Value Hsg Fin I Ltd	STEADVIEW CAPITAL MAURITIUS LIMITED	BUY	3205000	328.5
APTUS	Aptus Value Hsg Fin I Ltd	STEADVIEW CAPITAL MAURITIUS LIMITED	BUY	3205000	328.5
APTUS	Aptus Value Hsg Fin I Ltd	STEADVIEW CAPITAL OPPORTUNITIES PCC	SELL	3205000	328.5
APTUS	Aptus Value Hsg Fin I Ltd	STEADVIEW CAPITAL OPPORTUNITIES PCC	SELL	3205000	328.5
BGREENERGY	BGR Energy Systems Ltd	ANITA JAIDEEP SAMPAT	BUY	400000	54.85
BGREENERGY	BGR Energy Systems Ltd	JAIDEEP NARENDRA SAMPAT	BUY	500000	54.91
BGREENERGY	BGR Energy Systems Ltd	JAIDEEP NARENDRA SAMPAT HUF	BUY	400000	54.86
BGREENERGY	BGR Energy Systems Ltd	MALTI NARENDRA SAMPAT	BUY	400000	54.87
BGREENERGY	BGR Energy Systems Ltd	SASIKALA RAGHUPATHY	SELL	1773243	55.81
BLBLIMITED	BLB Limited	VORA FINANCIAL SERVICES PVT LTD	SELL	325000	52.51
BTML	Bodhi Tree Multimedia Ltd	PRATHIMA MALLINATH MADINENI	SELL	202893	176.25
CUPID	Cupid Limited	DOVETAIL INDIA FUND	BUY	45000	2700
CUPID	Cupid Limited	EBENE GLOBAL OPPORTUNITY FUND	SELL	45000	2700
DEEM	Deem Roll Tech Limited	VINEY EQUITY MARKET LLP	BUY	70000	199.33
DHRUV	Dhruv Consultancy Ser Ltd	MOHTA SARITA	SELL	99601	111.1
HEADSUP	Heads UP Ventures Limited	SABALE HARSHAWARDHAN HANMANT	BUY	200000	16.25
JUNIPER	Juniper Hotels Limited	NORGES BANK ON ACCOUNT OF THE GOVERNMENT PENSION FUND GLOBAL	BUY	2177724	398.15
KAMDHENU	Kamdhenu Ispat Limited	DOVETAIL INDIA FUND	BUY	500000	581.4
KAMDHENU	Kamdhenu Ispat Limited	DOVETAIL INDIA FUND	BUY	500000	581.4
KAMDHENU	Kamdhenu Ispat Limited	THREE DEE EXIM PRIVATE LIMITED	SELL	500000	581.4
KAMDHENU	Kamdhenu Ispat Limited	THREE DEE EXIM PRIVATE LIMITED	SELL	500000	581.4
NHIT	National Highw Infra Trus	NEO INFRA INCOME OPPORTUNITIES FUND	BUY	4800000	123.65
NHIT	National Highw Infra Trus	NEO MARKETS SERVICES PRIVATE LIMITED	SELL	4800000	123.65
PERFECT	Perfect Infraengineer Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	72000	56.52
RCDL	Rajgor Castor Deriv ati L	NEOMILE GROWTH FUND - SERIES I	SELL	129000	39.12
RCDL	Rajgor Castor Deriv ati L	ZAKI ABBAS NASSER	BUY	150000	39.45
SHANTHALA	Shanthala FMCG Products	ASHIS DEY	BUY	33600	96.79
TRANSWIND	Transwind Infra Limited	RASADA ENTERPRISES PRIVATE LIMITED	SELL	36000	39.23
ZENITHDRUG	Zenith Drugs Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	152000	99.9

Disclosure:

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