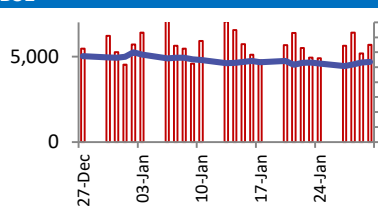
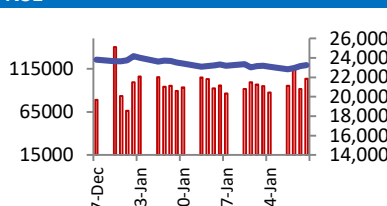


BSE



Open	76599
High	76963
Low	76401
Close	76760
Change	227
Volume (Lacs)	4944
Turnover (Rs.inCr)	5688

NSE



Open	23170
High	23322
Low	23139
Close	23250
Change	86
Volume(Lacs)	28650
Turnover(Rs.in Cr)	103561

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44882	44714	169	0.4%
Dow Futures	45110	45055	55	0.1%
Nasdaq	19682	19632	49	0.3%
FTSE	8647	8558	89	1.0%
Nikkei	39540	39514	26	0.1%
Hang Seng	20225	20225	Closed	Closed
Gift Nifty	23436	23466	(30)	-0.1%
Straits Singapore	3870	3801	69	1.8%
South Korea	2502	2537	(35)	-1.4%
Taiwan	23525	23525	Closed	Closed
Shanghai	3251	3253	(2)	-0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9081	9129	(48)	-0.5%
Alumin (\$/MT)	2609	2627	(18)	-0.7%
Zinc (\$/MT)	2774	2794	(20)	-0.7%
Brent Crude (\$/bbl)	77	77	0	0.6%
Gold (\$/Ounce)	2796	2795	2	0.1%
Silver (\$/Ounce)	31	32	(0)	-1.2%
Light Crude (\$/bbl)	73	73	1	0.8%
N G (\$/mmbtu)	3	3	0	1.6%
Sugar (\$/MT)	523	523	(0)	0.0%
Rubber (Rs./kg)	192	191	1	0.5%
Baltic Dry Index	715	726	(11)	-1.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	86.63	86.56	0.08%
Rs./ Euro	90.16	90.05	0.12%
Rs./Chinese Yuan	11.89	11.91	-0.10%
Yen / \$ rate	154.16	154.29	-0.08%
\$ US/Euro	1.04	1.04	-0.01%

Dollar Index	Current	Previous	Var(%)
Dollar Index	108.11	107.80	0.29%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	23170	49000
Support 2	23100	48740
Resistance	23300	49540

Securities in Ban For Trade
NIL

Market Review

US: US stocks ended higher on Thursday as investors digested a stack of key earnings reports.

Asia: Asia markets mostly rose Friday after Wall Street rose overnight as investors assessed Big Tech earnings.

India: Market continued its upward trend for the third consecutive day on Thursday, driven by strong performance in major stocks like Reliance Industries, Bharti Airtel and HDFC Bank. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

Global economy: Indonesia's foreign direct investment last year was 900.2 trillion rupiah (\$55.33 billion), up 21% on a yearly basis. FDI in the fourth quarter was 245.8 trillion rupiah, a 33.3% increase from the same period a year earlier, versus the third quarter's growth of 18.6%. The data excludes investment in financial and oil and gas sectors.

Japanese industrial production unexpectedly grew in December amid some recovery in manufacturing activity, while retail sales surged past expectations on strong private spending. Industrial production grew 0.3% month-on-month in December, beating expectations for a decline of 0.1% and picking up from the 2.2% contraction seen in the prior month, Government data showed on Friday. The December increase comes as several local exporters ramped up output and overseas shipments to front-load sales before the potential imposition of trade tariffs under U.S. President Donald Trump.

Commodities: Oil prices rose in Asian trade on Friday, benefiting from some dip buying, and were headed for a second week of losses as traders fretted over the prospect of trade tariffs under U.S. President Donald Trump.

Gold prices hit a fresh high on Friday and were set for a fifth straight weekly gain, as market participants worried about U.S. tariff threats while awaiting a key inflation report to assess the Federal Reserve's policy path.

Currency: The U.S. dollar edged higher against some of its peers including the yen and euro on Thursday as markets weighed fresh tariff threats, slower-than-expected U.S. economic growth, and an interest rate cut by the European Central Bank.

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	89148	7560	84445	11708	(4148)	222445	36422	445482	45571	(223037)	(9149)
Index Option	53836578	3455018	54402989	3495963	(40945)	1497509	254793	8246397	613900	(6748888)	(359107)
Stock Future	1089045	67708	1111620	67347	361	5697056	350816	5822256	354816	(125200)	(4000)
Stock Option	675560	43453	745010	48273	(4820)	344100	20580	1997859	120125	(1653759)	(99545)
Total	55690331	3573739	56344064	3623291	(49552)	7761110	662611	16511994	1134412	(8750884)	(471801)

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
23-Jan-25	15800	18861	(3061)
24-Jan-25	11537	14403	(2866)
27-Jan-25	10440	14955	(4514)
28-Jan-25	13195	16136	(2941)
29-Jan-25	8230	10026	(1796)
Month to date- Jan	236417	307339	(70922)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
24-Jan-25	11230	13989	(2758)
27-Jan-25	9489	14504	(5015)
28-Jan-25	11166	16087	(4921)
29-Jan-25	7644	10231	(2586)
30-Jan-25	10514	15097	(4583)
Month to date-Jan	228700	314885	(86186)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
24-Jan-25	12835	10433	2402
27-Jan-25	16503	9861	6642
28-Jan-25	19735	12921	6814
29-Jan-25	12871	11079	1793
30-Jan-25	13934	11768	2166
Month to date-Jan	326140	241780	84360
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
23-Jan-25	1439	933	506
24-Jan-25	1249	1528	(279)
27-Jan-25	4163	1510	2653
28-Jan-25	5478	1697	3781
29-Jan-25	2050	1544	506
Month to date- Jan	44746	40705	4040

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2138	52%	1502	53%
Decline	1812	44%	1288	45%
Unchanged	125	3%	67	2%

Market Turnover	30-Jan	29-Jan	Var (%)
BSE Cash	5688	5175	10%
NSE Cash	103561	91471	13%
NSE Futures	347409	319240	9%
NSE Options	44057250	15905375	177%
Total (Rs.Cr)	44513909	16321261	173%

Volatility Index	30-Jan	29-Jan
Volatility Index	17.39	18.64

Index PE - TTM	30-Jan	Yr. High	Yr. Low
Sensex	21.9	25.7	21.5
Nifty	21.1	24.4	20.8

Corporate News

Biocon buys back an investor stake in biologics unit, posts Rs 25 cr net profit in Q3FY25

Biocon's board has approved the acquisition of 1.5% equity in Biocon Biologics for Rs 550 cr, increasing its stake to 90.2%. The deal is expected to complete by February 1, 2025. Despite a significant drop in net profit, revenue and EBITDA have grown. Increased biosimilar market share and strategic approvals are expected to drive future growth. (ET)

Ircan International JV wins EPC project of Rs 631 cr

Ircan Intl has been awarded an EPC contract worth Rs 631.20 cr in JV through Letter of Acceptance by Office of the Project Director, Externally Aided Projects, Public Works Department, Manipur. The company's share in the project is Rs 164.11 cr. The contract involves construction of rigid pavement and lined drain of selected roads under Imphal East Division (BS)

Paradeep Phosphate to Invest Rs 4,000 Cr in Odisha

Paradeep Phosphate Ltd. has signed a MoU, with the government of Odisha for an investment of Rs 4,000 cr in the state. The company is to invest Rs 4,000 cr over five years to increase the phosphatic fertiliser manufacturing capacity in both intermediate and final products, including port or jetty and infrastructure development (NDTV).

Wipro bags five-year multi-mn contract from Etihad Airways

As part of the five-year contract, Wipro FullStride Cloud will deliver a customised cloud-based solution that will provide Etihad Airways real-time insights into their resource utilisation and improve operational agility and scalability for their global operations.(ET)

Economy

Measures on cards to spur coir exports

Gol plans to amend the 72-year-old Coir Industry Act to boost exports, introducing value-added products like jute and rubber blended coir. Reducing the coir board size by 50% aims for faster decision-making. The move also envisions export facilitation centres for producers. (ET)

International

Nvidia approves Samsung's advanced AI memory chips- Bloomberg

Nvidia has approved a version of Samsung Electronics' fifth-generation advanced high-bandwidth memory chips for artificial intelligence applications. NVIDIA Corporation approved Samsung Electronics' (KS:005930) 8-layer HBM3E chips- a less advanced version of the chip category- in December. (Invnt)

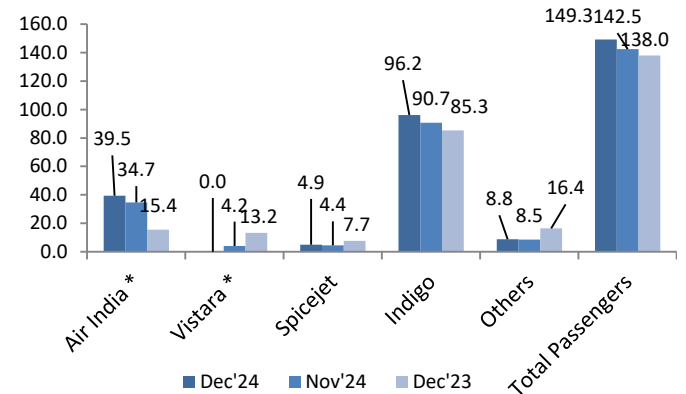
Top 5 Nifty Gainers	30-Jan	29-Jan	Var(%)
BEL	279	267	4.3%
POWERGRID	295	288	2.6%
HEROMOTOCO	4178	4072	2.6%
BHARTIARTL	1641	1600	2.5%
CIPLA	1457	1424	2.4%
Top 5 Nifty Losers	30-Jan	29-Jan	Var(%)
TATAMOTORS	697	753	-7.4%
ADANIENT	2253	2319	-2.8%
SHRIRAMFIN	538	554	-2.7%
BAJAJFINSV	1745	1790	-2.5%
ADANIPTS	1077	1097	-1.8%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	76760	0.3%	0.3%	-1.8%	7.0%
MIDCAP	42349	0.0%	-2.4%	-8.8%	9.2%
SMLCAP	49059	0.0%	-4.3%	-11.1%	7.3%
AUTO	50664	-0.3%	-0.3%	-1.9%	15.2%
BANKEKX	56004	0.2%	1.9%	-3.0%	7.7%
Capital Goods	62112	0.6%	-2.1%	-8.4%	9.6%
FMCG	20172	0.7%	-0.7%	-2.9%	1.4%
Health Care	41620	1.1%	-3.5%	-8.1%	23.1%
IT	41664	-0.9%	-2.5%	-3.5%	11.5%
METAL	28200	0.5%	-1.7%	-2.4%	5.4%
Oil & Gas	24898	1.6%	-3.4%	-4.5%	-3.9%
Power	6390	0.6%	-1.9%	-8.3%	1.1%
Realty	6994	1.5%	1.5%	-15.1%	3.4%

NSE USD Futures	30-Jan	29-Jan	Var (%)
Jan Expiry (Rs./\$)	86.58	86.58	0.0%
Feb Expiry (Rs./\$)	84.91	84.91	0.0%
Total Turnover (Rs. Crore)	18486	18486	0%

Sectors	TTM PE
Auto	28.86
Auto Ancillary	41.62
Banking	13.01
Engineering	50.74
Cement	79.91
Diamonds & Jewellery	53.32
Housing Finance	24.62
Infrastructure & Const	33.56
Metals-Aluminium	34.28
Metal – Steel	16.23
Oil Expl.	12.52
Pharma	9.35
Power – Gen. Supp.	42.02
Information Tech.	27.38
Sugar	21.84
Telecom Serv. Prov.	62.03
Tyres	25.7

Air Traffic (Passengers in Lakhs) (Source: DGCA)



10 year G-Sec Yield	Current	Previous	Change
US	4.53%	4.52%	2 bps
Japan	1.23%	1.22%	1 bps
India	6.68%	6.69%	(1) bps
UK	4.56%	4.62%	(6) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	624	624	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)	-2527	-2558	30.9

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

Bulk Deal As On 30/01/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539528	AAYUSH	AKARSHIKA TRADERS LLP	B	271129	52.77
539528	AAYUSH	ALIA COMMOSALES LLP	S	4601	57.55
539528	AAYUSH	ALIA COMMOSALES LLP	B	350352	52.57
539528	AAYUSH	MOONLIGHT MULTITRADE LLP	S	320128	57.48
539528	AAYUSH	MULTITUDE GROWTH FUNDS LIMITED	S	249922	52.15
539528	AAYUSH	NEXPACT LIMITED	S	255105	52.15
539528	AAYUSH	WHAMIA TRADERS LLP	B	301838	52.65
543439	BRANDBUCKT	CHIRAG BANSAL	B	126000	10.41
543439	BRANDBUCKT	RAVINDRA DHONDU DHURI	S	512000	10.41
512169	CAPRICORN	HEMANTH REDDY DANDEM	B	160000	10.5
512169	CAPRICORN	MANMOHAN RAO SUDDHALA	S	337000	10.5
512169	CAPRICORN	SUSHMA JAKKU	B	160000	10.5
530929	EUROASIA	NYRA BUSINESS DEVELOPMENT LLP	S	10000	24.66
530929	EUROASIA	RUCHIRA GOYAL	B	10000	24.66
524564	GAYATRIBI	G KIRAN KUMAR	B	340509	6.91
539228	GGPL	RONAK DUDALAL SHAH	B	275000	3.73
540938	GUJHYSPI	BHAVIKA DHIRAJLAL CHAVDA	B	120000	21.83
540938	GUJHYSPI	DILIP KHODIDAS KOTHARI HUF	S	150000	21.87
539175	INDRAIND	ALNASIR ABDUL AZIZ GILANI	S	60743	5.65
539175	INDRAIND	DILIP KUMAR SURANA	B	34000	5.75
544341	LICL	PREETI BHAIKA	S	104000	58.12
544341	LICL	SELVAMURTHY AKILANDESWARI	B	104000	58.53
540809	MRCAGRO	HARSH ATULKUMAR SHAH	B	132000	12.08
538874	NEXUSSURGL	ACQUITOR FINANCIAL SERVICES PVT.LTD.	B	35000	14.72
538874	NEXUSSURGL	RAJEEV KUMAR SINGH	S	42583	14.85
517554	NHCFODS	ASNANI STOCK BROKER PRIVATE LIMITED	B	4500260	1.13
517554	NHCFODS	CHANDRAKANT M AKHANI	S	19875625	1.13
517554	NHCFODS	COMFORT ADVERTISING PVT LTD	B	5000000	1.13
517554	NHCFODS	D P VORA SECURITIES PRIVATE LIMITED	B	3250000	1.13
517554	NHCFODS	ISHAAN TRADEFIN LLP	S	8920049	1.13
517554	NHCFODS	ISHAAN TRADEFIN LLP	B	2700000	1.14
517554	NHCFODS	RUTVIK THAKKAR	S	5000320	1.13
544269	NPFL	VAKANDA SERVICES PRIVATE LIMITED	S	150000	19.39
544269	NPFL	VAKANDA SERVICES PRIVATE LIMITED	B	150000	19.13
530805	OIVL	DEALMONEY COMMODITIES PRIVATE LIMITED	S	500000	12.41
530805	OIVL	HARSHA RAJESHBHAI JHAVERI	B	690000	12.41
530805	OIVL	MISTERKAPOORKESHRI	B	229132	12.41
530805	OIVL	SAUMIL A BHAVNAGRI HUF	S	227489	12.41
530805	OIVL	SAUMIL ARVINDBHAI BHAVNAGARI	B	252294	12.37
530805	OIVL	VIBHU MAURYA	S	700000	12.41
511734	PASUFIN	PACE STOCK BROKING SERVICES PVT LTD	S	41500	29.76
544303	TTC	NEO APEX VENTURE LLP	S	11400	489.29

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ATALREAL	Atal Realtech Limited	CHAITALI JATINKUMAR SHAH	BUY	700000	13.7
ATALREAL	Atal Realtech Limited	YELLOWSTONE VENTURES LLP	SELL	618077	13.7
JAKHARIA	JAKHARIA FABRIC LIMITE	JIGNESH AMRUTLAL THOBHANI	SELL	96800	50.03
JAKHARIA	JAKHARIA FABRIC LIMITE	MORNING VINIMAY PRIVATE LIMITED	BUY	96000	50
JWL	Jupiter Wagons Limited	ATYANT CAPITAL INDIA FUND 1_FDI	SELL	4000000	365.6
MAGSON	Magson Retail And Dist L	ANSHUL DINESHBHAI KHETANI	SELL	44000	82.62
MEGASTAR	Megastar Foods Limited	BEELINE MERCHANT BANKING PRIVATE LIMITED	BUY	140000	252.29
MEGASTAR	Megastar Foods Limited	KHUSHBU NIKHILKUMAR SHAH	SELL	140000	252.29
OLIL	Oneclick Logistics Ind L	HEMANT VINODBHAI LIMBASIYA	SELL	21600	120
OLIL	Oneclick Logistics Ind L	KETAN BALKRISHNA MEHTA	SELL	45600	120.01
OLIL	Oneclick Logistics Ind L	KETAN RAJENDRABHAI ACHARYA	BUY	42000	120
OLIL	Oneclick Logistics Ind L	PROMORE VENTURES PRIVATE LIMITED	BUY	42000	120
OLIL	Oneclick Logistics Ind L	YASH NITINBHAI TRVEDI	SELL	19200	120
SHANTI	Shanti Overseas (Ind) Ltd	REX PIPES AND CABLES INDUSTRIES LIMITED	BUY	114000	14.05
TCL	Thai Casting Limited	RASHI ENTERPRISES	SELL	275200	116.75

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