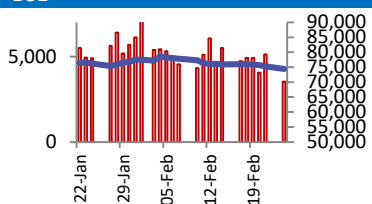
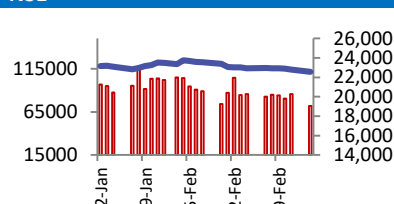


**BSE**



Open	74893
High	74907
Low	74387
Close	74454
Change	-857
Volume (Lacs)	4251
Turnover (Rs.inCr)	3530

**NSE**



Open	22609
High	22668
Low	22519
Close	22553
Change	-243
Volume(Lacs)	22678
Turnover(Rs.in Cr)	71947

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	43461	43428	33	0.1%
Dow Futures	43644	43535	109	0.3%
Nasdaq	19287	19524	(237)	-1.2%
FTSE	8659	8659	(0)	0.0%
Nikkei	38346	38777	(431)	-1.1%
Hang Seng	23193	23342	(149)	-0.6%
Gift Nifty	22578	22586	(8)	0.0%
Straits Singapore	3926	3928	(2)	0.0%
South Korea	2635	2645	(10)	-0.4%
Taiwan	23318	23565	(248)	-1.1%
Shanghai	3361	3373	(12)	-0.4%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9495	9559	(65)	-0.7%
Alumin (\$/MT)	2656	2688	(33)	-1.2%
Zinc (\$/MT)	2851	2928	(78)	-2.6%
Brent Crude (\$/bbl)	75	75	0	0.4%
Gold (\$/Ounce)	2948	2952	(4)	-0.1%
Silver (\$/Ounce)	32	32	0	0.3%
Light Crude (\$/bbl)	71	71	0	0.5%
N G (\$/mmbtu)	4	4	(0)	-0.7%
Sugar (\$/MT)	555	560	(6)	-1.0%
Rubber (Rs./kg)	191	191	0	0.0%
Baltic Dry Index	1002	981	21	2.1%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	86.71	86.71	0.00%
Rs./ Euro	90.80	90.78	0.02%
Rs./Chinese Yuan	11.96	11.95	0.04%
Yen / \$ rate	149.86	149.72	0.09%
\$ US/Euro	1.05	1.05	0.07%

Dollar Index	Current	Previous	Var(%)
Dollar Index	106.62	106.60	0.02%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22470	48540
Support 2	22400	48200
Resistance	22640	49000

Securities in Ban For Trade	
CHAMBLFERT	MANAPPURAM

**Market Review**

**US:** The tech-heavy NASDAQ index fell for a third consecutive session, with losses of 1.2% on Monday. Rising concerns over weak economic parameters and persistent inflation soured investor sentiments.

**Asia:** Asia Pacific region continued to decline on Tuesday, following US President Donald Trump's move to curb Chinese investments in technology, energy and other sectors.

**India:** Indian benchmark indices declined for the fifth consecutive session on Monday, closing at their lowest levels since June 2024, as losses in information technology and metal stocks weighed on the market. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

**Global economy:** Singapore's consumer inflation, along with the closely monitored core measure, eased in January, indicating that price pressures are in line with the goals of policymakers. The Department of Statistics reported on Monday that the CPI increased by 1.2% in January from the same month in the previous year.

Peru's GDP will likely expand by 4% this year and rank as the second-fastest growing economy in Latin America, a senior official told reporters on Monday, as inflation is seen holding for another year at around 2%.The Andean economy is bouncing back from recession, with the government of President Dina Boluarte and the central bank forecasting positive prospects for 2025, including fewer inflationary pressures and more investment.

**Commodities:** Oil prices jumped in Asian trading on Tuesday as the U.S. government's imposition of new sanctions targeting Iran's oil industry sparked fresh supply disruption worries.

Gold prices remain close to a record high amid safe-haven demand driven by concerns over U.S. President Trump's tariff plans and potential inflation. Spot gold was nearly unchanged, with investors closely monitoring the Federal Reserve's response to economic changes and upcoming inflation data.

**Currency:** The yen rose to its highest level in 2-1/2 months due to a surge in Japanese inflation. The dollar weakened as Trump's tariff threats remained mostly rhetoric.

**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	77428	11990	85427	13381	(1391)	289694	45503	275149	43518	14545	1985
Index Option	5418510	889696	5438335	891551	(1855)	3112119	504628	2183179	355591	928940	149037
Stock Future	2284552	136370	2258498	134494	1876	5873951	350351	5859577	351407	14374	(1056)
Stock Option	1325358	81498	1313926	80924	574	1861813	107149	1848825	107241	12988	(92)
<b>Total</b>	<b>9105848</b>	<b>1119554</b>	<b>9096186</b>	<b>1120350</b>	<b>(796)</b>	<b>11137577</b>	<b>1007631</b>	<b>10166730</b>	<b>857757</b>	<b>970847</b>	<b>149874</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
14-Feb-25	8848	13872	(5023)
17-Feb-25	9143	11265	(2123)
18-Feb-25	32022	23806	8216
20-Feb-25	11216	14723	(3508)
21-Feb-25	10971	14402	(3431)
<b>Month to date- Feb</b>	<b>195739</b>	<b>222879</b>	<b>(27140)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
18-Feb-25	14538	9751	4787
19-Feb-25	11571	13452	(1881)
20-Feb-25	11132	14443	(3312)
21-Feb-25	10144	13593	(3449)
24-Feb-25	7906	14192	(6287)
<b>Month to date-Feb</b>	<b>188462</b>	<b>231725</b>	<b>(43263)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
18-Feb-25	12793	9721	3072
19-Feb-25	11193	9235	1958
20-Feb-25	13180	9273	3908
21-Feb-25	12889	10005	2885
24-Feb-25	12552	7366	5186
<b>Month to date-Feb</b>	<b>224313</b>	<b>176527</b>	<b>47787</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
14-Feb-25	693	2433	(1740)
17-Feb-25	2347	2849	(502)
18-Feb-25	846	2849	(2003)
20-Feb-25	1580	2811	(1231)
21-Feb-25	2701	3319	(618)
<b>Month to date- Feb</b>	<b>26317</b>	<b>34583</b>	<b>(8266)</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1157	28%	727	25%
Decline	2879	69%	2132	73%
Unchanged	164	4%	67	2%

Market Turnover	24-Feb	21-Feb	Var (%)
BSE Cash	3530	5126	-31%
NSE Cash	71947	85628	-16%
NSE Futures	331933	277438	20%
NSE Options	12512610	11074844	13%
Total (Rs.Cr)	12920021	11443036	13%

Volatility Index	24-Feb	21-Feb
Volatility Index	14.44	14.53

Index PE - TTM	24-Feb	Yr. High	Yr. Low
Sensex	20.7	25.7	20.7
Nifty	20.1	24.4	20.1

**Corporate News**

**NTPC Group Inks Deals Of Over Rs 2 Lakh Crore With Madhya Pradesh Government**

NTPC Ltd., along with its subsidiary NTPC Green Energy Ltd., signed various memorandum of understandings with the Madhya Pradesh government at the ongoing two-day Global Investors' Summit that began in Bhopal on Monday. (NDTV)

**Torrent Green Energy Incorporates New Step-Down Subsidiary For Renewable Power**

Torrent Power on Monday said its arm Torrent Green Energy has incorporated Torrent Urja 32 Pvt Ltd. or TU32 for generating electricity from renewable energy. (NDTV)

**LIC Housing rises as board to mull FY25 borrowing budget**

LIC Housing Finance added 2.76% to Rs 660.20 after the company announced that its board is scheduled to meet on 7 March 2024 to consider borrowing budget for financial year 2024-2025. (NDTV)

**Economy**

**Retail inflation eases slightly to 4.61% for farm workers, 4.73% for rural labourers**

Retail inflation for farm and rural workers eased slightly to 4.61% and 4.73%, respectively, in January from 5.01% and 5.05% in December 2024. The All-India Consumer Price Index for Agricultural Labourers and Rural Labourers decreased by 4 points and 3 points, respectively, for the month of January 2025, reaching 1,316 and 1,328 points, the labour ministry said in a statement. (ET)

**PM Modi transfers Rs 22,000 cr to bank accounts of 9.8 cr farmers under 19th installment of PM Kisan scheme**

Prime Minister Narendra Modi released the 19th instalment of the PM-KISAN scheme from Bihar's Bhagalpur, benefiting 9.8 crore farmers with ₹22,700 crore. With Bihar's assembly elections approaching, Union Minister Shivraj Singh Chouhan reviewed preparations and discussed the proposed "Makhana Board."(ET)

**International**

**Woodside reports 13% drop in annual profit on lower energy prices**

Woodside Energy on Tuesday reported a decline in its underlying profit for the full year 2024, driven by lower realized oil and gas prices, despite achieving record production levels. The company's underlying net profit after tax fell 13% to \$2.88 billion for the year ended December 31.(Inv)

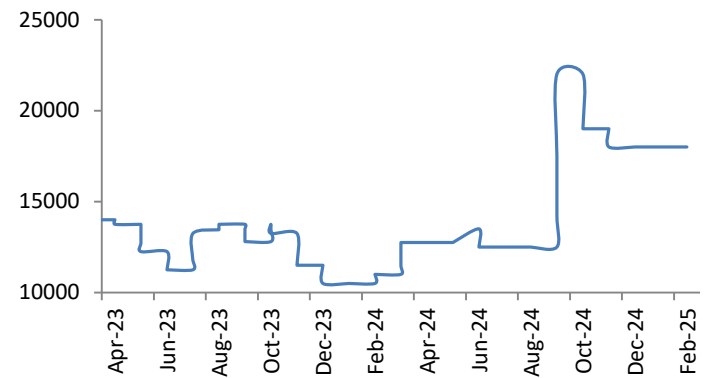
Top 5 Nifty Gainers	24-Feb	21-Feb	Var(%)
M&M	2709	2669	1.5%
DRREDDY	1165	1152	1.1%
EICHERMOT	5011	4962	1.0%
HEROMOTOCO	3885	3853	0.8%
KOTAKBANK	1966	1953	0.7%
Top 5 Nifty Losers	24-Feb	21-Feb	Var(%)
WIPRO	295	306	-3.7%
HCLTECH	1644	1701	-3.3%
TCS	3676	3786	-2.9%
INFY	1764	1815	-2.8%
BHARTIARTL	1601	1639	-2.3%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	74454	-1.1%	-2.0%	-2.3%	1.8%
MIDCAP	40058	-0.8%	0.3%	-6.2%	0.3%
SMLCAP	45254	-1.3%	0.2%	-9.7%	-1.7%
AUTO	48239	0.2%	-1.7%	-3.5%	1.7%
BANKEKX	55431	-0.5%	-1.0%	1.3%	4.2%
Capital Goods	57758	-1.1%	1.2%	-7.2%	1.8%
FMCG	18973	0.2%	-1.1%	-6.8%	-3.2%
Health Care	39436	-0.5%	-2.2%	-6.5%	10.3%
IT	38729	-2.6%	-3.9%	-9.3%	0.3%
METAL	28567	-2.2%	2.6%	0.2%	4.3%
Oil & Gas	23638	-1.1%	0.5%	-6.1%	-16.7%
Power	6020	-1.2%	2.6%	-6.8%	-9.0%
Realty	6502	-0.9%	0.5%	-3.2%	-10.4%

NSE USD Futures	24-Feb	21-Feb	Var (%)
Feb Expiry (Rs./\$)	86.72	84.83	2.2%
Mar Expiry (Rs./\$)	85.04	86.67	-1.9%
Total Turnover (Rs. Crore)	18890	4171	353%

Sectors	TTM PE
Auto	29.17
Auto Ancillary	38.31
Banking	12.71
Engineering	45.11
Cement	70.74
Diamonds & Jewellery	44.93
Housing Finance	23.96
Infrastructure & Const	31.45
Metals-Aluminium	25.66
Metal – Steel	16.58
Oil Expl.	9.41
Pharma	9.08
Power – Gen. Supp.	37.16
Information Tech.	25.81
Sugar	16.77
Telecom Serv. Prov.	42.75
Tyres	27.53

Copra Prices (INR/quintal) (Source: BBG)



10 year G-Sec Yield	Current	Previous	Change
US	4.38%	4.40%	(3) bps
Japan	1.39%	1.43%	(4) bps
India	6.70%	6.71%	(0) bps
UK	4.56%	4.57%	(1) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	636	636	0.0%
Inflation - WPI	2.31%	2.37%	(6) bps
Inflation - CPI	4.31%	5.22%	(91) 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)	-2201	-2202	0.4

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	20.83	12509533	21.17	13778293	-1.61%	1	1806.07	1764.10	2.4%
Wipro	3.41	2960778	3.48	5681906	-2.01%	1	295.66	295.05	0.2%
Dr.Reddy's	13.49	1528979	13.35	1581529	1.05%	1	1169.65	1164.55	0.4%
ICICI Bank	28.23	5541840	28.16	3166893	0.25%	2	1223.84	1218.35	0.5%
HDFC Bank	59.66	3733166	59.48	2124666	0.30%	3	1724.27	1677.10	2.8%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	37.40	37.90	(0.5)	-1.3%
RIL	55.80	56.30	(0.5)	-0.9%
SBI	82.30	83.10	(0.8)	-1.0%

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	17 Mar
Indian Monetary Policy	09 Apr
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
SBI Cards And Payment Services Ltd.	25/02/25	Rs.2.50 per share(25%)Interim Dividend
Bhatia Communications & Retail (India) Ltd.	28/02/25	Rs.0.01 per share(1%)Third Interim Dividend
International Gemmological Institute (India) Ltd.	28/02/25	Interim Dividend
Nava Ltd.	28/02/25	Buy Back of Shares
Oasis Securities Ltd.	28/02/25	Stock Split from Rs.10/- to Re.1/-
Panchsheel Organics Ltd.	28/02/25	Rs.0.80 per share(8%)Interim Dividend
Power Finance Corporation Ltd.	28/02/25	Rs.3.50 per share(35%)Third Interim Dividend
RDB Infrastructure And Power Ltd.	28/02/25	Stock Split from Rs.10/- to Re.1/-

**Bulk Deal As On 24/02/25**

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
539091	CITL	HIMANSHU CHINUBHAI SHAH	S	1996882	2.45
539091	CITL	MAHENDRA MAGANSINH ZALA	S	982318	2.45
544195	COTFAB	CRAFT EMERGING MARKET FUND PCC- ELITE CAPITAL FUND	B	142000	36.85
544195	COTFAB	VINEY EQUITY MARKET LLP	S	142000	36.85
537707	ETT	KAUSHAL HITESHBHAI PARIKH	S	20011	17.94
537707	ETT	KAUSHAL HITESHBHAI PARIKH	B	355085	17.27
543500	EVOQ	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	132000	4.81
543500	EVOQ	PRIYASHA MEVEN FINANCE LTD.	B	128000	4.63
543500	EVOQ	PRIYASHA MEVEN FINANCE LTD.	S	128000	4.7
543500	EVOQ	PUJABAHEN BAROT	S	832000	4.5
543500	EVOQ	PUJABAHEN BAROT	B	352000	5.19
543372	GETALONG	SHEHZAD ABUBAKER HIRA	S	120000	25.65
544349	HMEML	DIPAK PADMAKANT PANDYA	B	89600	67.03
534659	JOINTECAED	AKE SECURITIES PRIVATE LIMITED	B	88000	4.85
534659	JOINTECAED	SKA MARKETING PRIVATE LIMITED	S	88000	4.85
543289	KGES	ANKITMANTRY	S	24000	31.88
543289	KGES	JIGAM SHASHIKANT GANDHI	B	12000	31.88
543289	KGES	RUCHIRA GOYAL	B	12000	31.88
530145	KISAN	APOLLO PIPES LIMITED	B	600000	48.11
544248	MCEL	ARCHIT INFRASTRUCTURE AND DEVELOPERS LLP	B	349800	201.25
544248	MCEL	VINEY EQUITY MARKET LLP	S	348000	201.19
540809	MRCAGRO	RASHI AGRAWAL	S	79644	11.38
540809	MRCAGRO	RASHI AGRAWAL	B	171314	11.38
522289	NMSRESRC	NEELAM MITTAL	B	21966	29.5
522289	NMSRESRC	SATYA PRAKASH MITTAL HUF	S	21966	29.5
530805	OIVL	CHHAVI YADAV	B	160000	11.93
530805	OIVL	SHARE INDIA SECURITIES LIMITED	S	129361	11.93
530805	OIVL	SHARE INDIA SECURITIES LIMITED	B	200000	11.94
530805	OIVL	VIVEK MISHRA	B	208047	11.93
530805	OIVL	YAKSHIT FINANCE LIMITED	S	200000	11.94
543400	OMNIPOTENT	SUMANTEKRIWAL	B	32000	8.24
543400	OMNIPOTENT	VINAYKUMARTEKRIWAL	S	32000	8.24
540198	OSIAJEE	MAMTA DEVI	S	36466	106.97
540198	OSIAJEE	PRACHI SMIT DANI	B	30000	106.97
517397	PANELEC	RAJAN MALHOTRA	B	22454	73.66
526490	PRATIK	DEEPTI GHANSHYAM GAVALI	B	333275	6.3
526490	PRATIK	RAJIV HARIT	S	750000	6.3
519397	SHINDL	PEDABALLE VINOD KUMAR REDDY	S	127271	84.4
519397	SHINDL	RAASHA FINCAP PRIVATE LIMITED	B	175100	84.46
527005	SHREEPAC	AYUSH MITTAL	B	50000	75.9
527005	SHREEPAC	PRATYUSH MITTAL	S	66900	75.9
541540	SOLARA	AARTI BHATIA	B	204527	490
541540	SOLARA	BHATIA SURESH	S	204527	490
500421	TPINDIA	BIREN P.GANDHI HUF	S	671000	17
500421	TPINDIA	SHRENI SHARES LTD	B	668500	17
519367	TRANSFD	SHAVETA CHOUDHARY	S	774	184.75
538597	TTIENT	REAL ONE MULTITRADE INDIA PRIVATE LIMITED	B	3500000	10.56
538597	TTIENT	VALATH SREENIVASAN RANGANATHAN	S	3500000	10.56
522267	VJLAXMIE	ATHIMOOLAM NAIDU	B	72000	62.42
522267	VJLAXMIE	VEEJAY SALES AND SERVICES LIMITED	S	71194	62.42

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
MAKS	Maks Energy Sol India Ltd	PRATYUSH MITTAL	BUY	69000	31
MAKS	Maks Energy Sol India Ltd	SATYA PRAKASH MITTAL	SELL	69000	31
POLYSIL	Poly sil Irrigation Syst L	NARESHKUMAR RANCHHODHAI VIRJA	SELL	104000	19.63
PRAXIS	Praxis Home Retail Ltd	SURPLUS FINVEST PRIVATE LIMITED	SELL	707857	13.74
QUADPRO	Quadpro ITeS Limited	NEELAM MITTAL	BUY	324000	3.4
QUADPRO	Quadpro ITeS Limited	SATYA PRAKASH MITTAL	SELL	324000	3.4
QPOWER	Quality Power Elec Equip L	PENTATEAM INVENTURE CAPITAL SCHEME I	SELL	838512	410.68
QPOWER	Quality Power Elec Equip L	SAMYAKTVA CONSTRUCTION LLP	BUY	1800000	430
ROYALARC	Royal Arc Electrodes Ltd	SHARE INDIA SECURITIES LIMITED	BUY	99600	121
ROYALARC	Royal Arc Electrodes Ltd	SHRENI SHARES PVT	BUY	271200	120
ROYALARC	Royal Arc Electrodes Ltd	YAMMADA SUBRAMANIAM VENKATA	BUY	72000	121.15
SAMPANN	Sampann Utpadan India Ltd	ANTARA INDIA EVERGREEN FUND LTD (ANTARA INDIA EVERGREEN FUND(FPI))	BUY	932555	29.96
SAMPANN	Sampann Utpadan India Ltd	DAVOS INTERNATIONAL FUND	SELL	950000	29.96
TEJASCARGO	Tejas Cargo India Limited	NEW BERRY CAPITALS PRIVATE LIMITED	BUY	1060000	174.33

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