

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	49590	49504	86	0.17%
Dow Futures	49787	49809	(22)	-0.04%
Nasdaq	23734	23671	63	0.26%
FTSE	10141	10125	16	0.16%
Nikkei	53541	51940	1601	3.08%
Hang Seng	26902	26608	294	1.10%
Gift Nifty	25915	25859	56	0.21%
Straits Singapore	4793	4767	26	0.56%
South Korea	4644	4625	19	0.42%
Taiwan	30652	30567	85	0.28%
Shanghai	4158	4165	(7)	-0.17%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	13210	12998	212	1.6%
Alumin (\$/MT)	3185	3136	49	1.5%
Zinc (\$/MT)	3216	3154	63	2.0%
Brent Crude (\$/bbl)	64	64	0	0.1%
Gold (\$/Ounce)	4593	4598	(4)	-0.1%
Silver (\$/Ounce)	85	85	0	0.4%
Light Crude (\$/bbl)	60	60	0	0.1%
N G (\$/mmbtu)	3	3	(0)	-1.9%
Sugar (\$/MT)	423	426	(2)	-0.6%
Rubber (Rs./kg)	188	187	1	0.5%
Baltic Dry Index	1659	1688	(29)	-1.7%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	90.16	90.16	0.00%
Rs./ Euro	105.32	104.97	0.33%
Rs./Chinese Yuan	12.93	12.93	-0.04%
Yen /\$ rate	158.66	158.14	0.33%
\$ US/Euro	1.17	1.17	-0.07%

Dollar Index	Current	Previous	Var(%)
Dollar Index	98.97	98.86	0.11%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	25800	59500
Support 2	25690	59300
Resistance	25990	59980

Securities in Ban For Trade		
SAIL		SAMMAANCAP

### Market Review

**US:** The US markets closed in green at record high levels after witnessing heavy selling pressure in the initial hours. The S&P 500 index made a record high by gaining 0.2% amid the probe into the Federal Reserve by the Department of Justice.

**Asia:** Asian stock markets climbed, led by a surge in Japan's Nikkei, as investor optimism over AI and expectations of fiscal stimulus in Tokyo outweighed lingering concerns about the Federal Reserve's independence.

**India:** Indian equities broke their five-day losing streak to end near day's high as India-US trade deal hopes, and earnings season ignited a sharp rebound. Nifty had fallen below the 25,000 levels but closed near 25,800. **Market is expected to open on a positive note and likely to witness positive move during the day.**

**Global economy:** President Trump announced a 25% tariff on countries conducting business with Iran, while simultaneously considering military action against the Iranian regime. Effective immediately, any Country doing business with the Islamic Republic of Iran will pay a Tariff of 25% on any and all business being done with the United States of America.

Federal Reserve Bank of New York President John Williams said, he expects a healthy economy in 2026 and indicated he sees no near-term reason to cut interest rates. The interest-rate-setting Federal Open Market Committee has moved the modestly restrictive stance of monetary policy closer to neutral, Williams said in a speech delivered before a gathering held by the Council on Foreign Relations in New York.

Japan's plan to give authorities the power to order foreign investors to retroactively divest acquisitions is aimed at sheltering major firms and supply chains, though it is unlikely to curtail increased M&A interest, experts say. Japan on Wednesday proposed amendments to its foreign investment screening law that would grant authorities an option to force foreigners to sell investments deemed to pose risks to national or economic security.

**Commodities:** Oil prices edged higher on Tuesday, as heightened concerns surrounding Iran and potential supply disruptions outweighed the prospect of increased crude supply from Venezuela.

Gold eased on Tuesday, a day after breaching \$4,600/ounce for the first time ever, as investors booked profits amid heightened geopolitical and economic uncertainty.

**Currency:** The dollar held to its losses on Tuesday after the Trump administration opened a criminal investigation into Federal Reserve Chair Jerome Powell, a move that threatens the central bank's independence and faith in U.S. assets.

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	24887	4254	32233	5482	(1228)	229047	38711	219063	36881	9984	1830
Index Option	17611827	2950179	17607697	2950145	34	2875423	484080	2867882	480796	7541	3284
Stock Future	334407	22959	325172	22068	891	6156837	415910	6148982	414136	7855	1774
Stock Option	496889	34303	486443	33695	608	601289	40808	554153	37566	47136	3242
<b>Total</b>	<b>18468010</b>	<b>3011695</b>	<b>18451545</b>	<b>3011390</b>	<b>305</b>	<b>9862596</b>	<b>979509</b>	<b>9790080</b>	<b>969379</b>	<b>72516</b>	<b>10130</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
5-Jan-26	12335	11598	737
6-Jan-26	15512	15529	(16)
7-Jan-26	15080	16919	(1839)
8-Jan-26	11324	15034	(3710)
9-Jan-26	12001	15688	(3687)
<b>Month to date- Jan</b>	<b>75889</b>	<b>86797</b>	<b>(10908)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
6-Jan-26	15061	15169	(108)
7-Jan-26	14664	16191	(1528)
8-Jan-26	11090	14457	(3367)
9-Jan-26	11093	14863	(3769)
12-Jan-26	9072	12710	(3638)
<b>Month to date-Jan</b>	<b>81175</b>	<b>96601</b>	<b>(15425)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
6-Jan-26	17240	15491	1749
7-Jan-26	18365	15475	2889
8-Jan-26	18707	15006	3701
9-Jan-26	18481	12885	5596
12-Jan-26	16986	11147	5839
<b>Month to date-Jan</b>	<b>133740</b>	<b>109998</b>	<b>23742</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
5-Jan-26	2852	3535	(683)
6-Jan-26	2123	3036	(913)
7-Jan-26	5106	3047	2059
8-Jan-26	2417	3138	(721)
9-Jan-26	1296	1015	280
<b>Month to date- Jan</b>	<b>16722</b>	<b>14621</b>	<b>2102</b>

#### Corporate News

**KP Group** has entered into a MoU with the Gujarat government for the development of renewable energy projects worth Rs 4,000 cr in Gujarat. Under the MoU, KP Group proposes to establish renewable energy projects with a total capacity of approximately 855 MW, comprising solar power projects and ISTS-connected wind solar hybrid power projects. (MC)

**Sical Logistics Ltd** has received a letter of acceptance from **South Eastern Coalfields Ltd** for a project valued at Rs. 4,038 cr. The contract pertains to the Porda Chimgapani open cast project in Chhattisgarh. The contract, awarded by a domestic entity, is to be executed over a period of 4,214 days. (NDTV)

**NLC India** has given in-principle approval for the listing of the company's subsidiary, NLC India Renewables, through the dilution of up to 25% of its equity stake in one or more tranches via a public offer. Additionally, the Board approved an investment of up to Rs 66.60 cr in one or more tranches in NLC India Renewables, as and when required, to fund green energy projects to be executed through joint venture companies. (MC)

**NBCC arm** signed strategic collaboration with **Bharat Electronics**. The collaboration covers healthcare manufacturing, medical devices, digital solutions, consultancy and project execution. (NDTV)

#### Economy

In December 2025, retail inflation climbed to 1.3%, rising from November's 0.7%, setting a new three-month peak. While this increase remains shy of the central bank's goal, the easing of food deflation contrasted with the uptick in prices for various goods. (ET)

India's net direct tax collections have seen a significant increase of 8.82%, reaching Rs 18.38 lakh cr between April 1 and Jan 11. This growth encompasses both corporate and non-corporate tax contributions. Notably, total refunds issued during this period saw a substantial decrease of 16.92% compared to the previous year. (ET)

#### International

**SK Hynix** will invest \$12.9 bn to build a new advanced packaging plant, as it expands production to meet rising demands driven by the artificial intelligence boom. The new fabrication facility will be located in the Korean city of Cheongju, building on the company's existing footprint there. Construction set to begin in April, with completion targeted for the end of 2027, the firm said in a statement. (Inv)

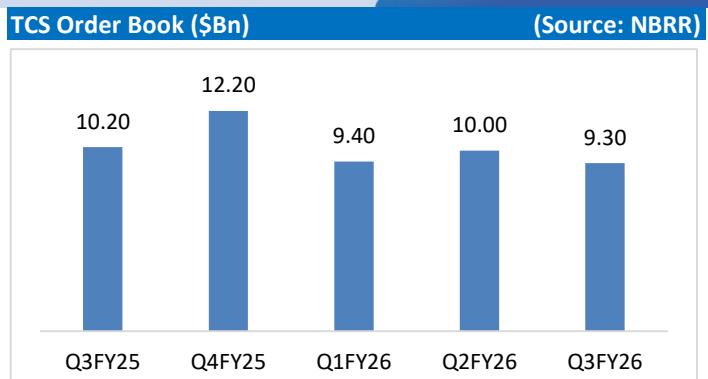
Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1468	33%	1255	37%
Decline	2837	63%	2051	61%
Unchanged	185	4%	81	2%

Market Turnover	12-Jan	09-Jan	Var (%)
BSE Cash	8879	8667	2%
NSE Cash	103692	106747	-3%
NSE Futures	123970	126456	-2%
NSE Options	40021798	25521425	57%
Total (Rs.Cr)	40258339	25763295	56%

Volatility Index	12-Jan	09-Jan
Volatility Index	11.37	10.93

Index PE - TTM	12-Jan	Yr. High	Yr. Low
Sensex	23.1	24.1	20.3
Nifty	22.5	23.0	19.6

Top 5 Nifty Gainers		12-Jan	09-Jan	Var(%)
COALINDIA		432	418	3.3%
TATASTEEL		183	178	2.7%
ASIANPAINT		2896	2826	2.5%
HINDALCO		920	901	2.1%
TRENT		4056	3973	2.1%
Top 5 Nifty Losers		12-Jan	09-Jan	Var(%)
INFY		1596	1614	-1.1%
TMPV		351	354	-1.0%
EICHERMOT		7436	7507	-0.9%
BAJFINANCE		952	960	-0.8%
BAJAJ-AUTO		9491	9563	-0.7%



BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	83878	0.4%	-1.8%	-1.6%	9.9%
MIDCAP	46117	-0.4%	-3.0%	-0.8%	8.8%
SMLCAP	49574	-0.7%	-4.6%	-2.6%	-1.9%
AUTO	62199	-0.1%	-2.8%	0.6%	23.2%
BANKEX	66860	0.4%	-0.9%	0.3%	22.4%
Capital Goods	65048	-0.8%	-4.3%	-2.6%	5.0%
FMCG	19272	0.4%	-1.8%	-3.7%	-5.8%
Health Care	43455	-0.5%	-1.2%	-1.4%	2.1%
IT	36686	-0.3%	0.2%	-0.9%	-15.7%
METAL	37313	1.9%	-1.5%	6.9%	39.2%
Oil & Gas	27436	0.6%	-4.0%	-1.9%	9.2%
Power	6336	-0.4%	-5.5%	-2.8%	3.0%
Realty	6730	-1.1%	-5.4%	-2.2%	-5.1%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	116183	1%	1%	4%	8%
Fresh Exposure	3135	-31%	-26%	15%	-18%
Exposure liquidated	3378	-11%	-35%	59%	-14%
Closing Net scripwise outstanding	115940	0%	2%	3%	8%

NSE USD Futures	12-Jan	09-Jan	Var (%)
Jan Expiry (Rs./\$)	89.05	88.24	0.9%
Feb Expiry (Rs./\$)	89.97	89.05	1.0%
Total Turnover (Rs. Crore)	1199	1740	-31%

Sectors	TTM PE
Auto	33
Auto Ancillary	42.7
Banking	14.98
Engineering	37.83
Cement	67.82
Diamonds & Jewellery	41.36
Housing Finance	23.67
Infrastructure & Const	27.8
Metals-Aluminium	26.86
Metal – Steel	18.09
Oil Expl.	11
Pharma	10.89
Power – Gen. Supp.	39.61
Information Tech.	29
Sugar	16.51
Telecom Serv. Prov.	38.22
Tyres	34.75

10 year G-Sec Yield	Current	Previous	Change
US	4.18%	4.18%	0 bps
Japan	2.14%	2.10%	4 bps
India	6.61%	6.64%	(4) bps
UK	4.37%	4.37%	(0) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	602	687	-12.4%
Inflation - WPI	-0.32%	-1.21%	89 bps
Inflation - CPI	1.33%	0.71%	62 bps

India GDP	Q3FY25	Q2FY25	Var (%)
Growth	8.23%	7.81%	42 bps

Monetary Policy	Current	Previous	Change
Repo Rate	5.25%	5.50%	(25) bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	3.00%	3.75%	(75) bps
O/S Banking System Liquidity (Rs bn)	118	119	(0.4)

IIP Growth %	Nov-25	Nov-24	Apr-Nov
IIP	6.7	5.0	4.0
Capital Goods	10.4	8.9	5.6
Mining	8.0	5.5	4.9
Manufacturing	-1.5	4.4	-0.3
Electricity	5.4	1.9	2.5

ADR Price Movement									
Company	Price	Volume	Previous	Volume	Variance	No. of Share	ADR Price	BSE	Variance
	(US\$)		Day Price		(%)	Per ADR	(Rs.)	Price	(%)
Infosys Tech	17.80	12811603	17.83	6356287	-0.17%	1	1604.92	1595.90	0.6%
Wipro	2.91	3709903	2.87	4841075	1.39%	1	262.38	263.10	-0.3%
Dr.Reddy's	13.48	1093300	13.40	1343578	0.60%	1	1215.41	1215.50	0.0%
ICICI Bank	31.20	6271052	30.66	6912178	1.76%	2	1406.56	1413.10	-0.5%
HDFC Bank	33.52	3690888	33.10	5371160	1.27%	3	1007.43	936.95	7.5%

GDR's (US\$)				
	Prices	Prev. Close	Change	Var %
L&T	44.45	44.50	(0.0)	-0.1%
RIL	65.90	65.70	0.2	0.3%
SBI	113.20	111.60	1.6	1.4%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.70%	3.00%
Unemployment (%)	4.40%	4.50%
Interest Rate (%)	Current	Previous
Fed Rate	3.75%	4.00%

US GDP	Q2CY25	Q1CY25
Growth (QoQ Annualized)	4.30%	3.80%
China Economy Data	Current	Previous
GDP	4.80%	5.20%
Inflation – CPI (%)	0.80%	0.70%

Economic Calendar	Date
Indian GDP Data	27 Feb
Indian Inflation Data CPI	12 Feb
Indian Inflation Data WPI	14 Jan
Indian Monetary Policy	27 Feb
India's Industrial Production (IIP)	28 Jan
US Inflation Data	13 Jan
US GDP	22 Jan
US Unemployment Data	06 Feb
US Fed Rate	29 Jan
China GDP	19 Jan
China Inflation Data	11 Feb

Event Update			
Name	Date	Purpose	
Authum Investment & Infrastructure Ltd.	13-01-26	Bonus issue	
Kotak Mahindra Bank Ltd.	14-01-26	Stock Split from Rs.5/- to Re.1/-	
Ajmera Realty & Infra India Ltd.	15-01-26	Stock Split from Rs.10/- to Rs.2/-	
Best Agrolife Ltd.	16-01-26	Bonus issue	
Jaro Institute of Technology Management and Research Ltd.	16-01-26	Interim Dividend	

13th January, 2026

Bulk Deal As On 12/01/26

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
538539	ANVRDHI	PARSHWA JASMIN BAVISHI	B	83501	9.95
544671	ATIL	EVEREST CORPORATION	B	273000	132.6
511730	AVASARA	HETAL BHANSALI	B	30000	16.42
544337	AVAX	ASHISH KUMAR AGRAWAL	B	7000	222.57
540545	BGJL	SURENDRA KUMAR BISHNOI	B	82000	44.78
531458	BOSTONBIO	ADITI YOGESH SINGH KARAYAT	S	57150	8.32
531458	BOSTONBIO	ANIKET PANDURANG BHILARE	S	59000	8.32
531458	BOSTONBIO	BINISHZAHERA MOHAMMED BAKIR MISTRY	B	44250	8.32
531458	BOSTONBIO	SANJAY ATMARAM CHAUDHARI (HUF)	S	69979	8.32
543831	BRIGHT	AEGIS INVESTMENT FUND	S	124875	400.85
543831	BRIGHT	RAMNEEK SEHGAL AND SONS HUF	B	124875	401.36
522027	EMAININDIA	GUTTIKONDA VARA LAKSHMI	B	9188	439.29
544094	EUPHORIAIT	PIYUSH SECURITIES PVT LTD	S	21600	35.3
544094	EUPHORIAIT	RESPONCE SECURITIES PRIVATE LIMITED	B	21600	35.3
513295	IMEC	PRASHANT GUPTA	S	11243	309.12
513295	IMEC	PRASHANT GUPTA	B	14092	289.73
513361	INDIAHOMES	F3 ADVISORS PRIVATE LIMITED	B	5700000	12.99
513361	INDIAHOMES	METAL INDUSTRIAL PTE. LIMITED	S	5700000	13
513361	INDIAHOMES	NAV RATAN MADANLAL BAGRECHA	S	2418000	13.01
513361	INDIAHOMES	SETU SECURITIES PVT LTD	B	4300000	13
542446	JONJUA	PUSHPA BHAJU	S	171440	5.97
544641	KVTOYS	ROYAL ALPHA OPPORTUNITY FUND	B	79200	326.27
517449	MAGNAELQ	FIBRE2FASHION PRIVATE LIMITED	B	23000	823
541337	MILEFUR	CHAVDA DEVYANIBEN ANILKUMAR	S	60000	29.79
541337	MILEFUR	CHAVDA DEVYANIBEN ANILKUMAR	B	102000	30.02
541337	MILEFUR	MOHAMMADUVES GULAMRASUL GOLAWALA	B	60000	30.65
532887	NEUEON	SHARDE NATURAL ORGANICS WONDERS (OPC) PRIVATE LIMITED	B	465502	8.41
531395	PADAMCO	PANKAJ MITTAL	S	990717	3.09
531395	PADAMCO	SAPNA MITTAL	S	2417109	2.92
512591	PULSRIN	NITU KUMARI	S	439045	2.38
512591	PULSRIN	RATHOD DIGVIJAYSINH RAJENDRASINH	B	438793	2.36
512591	PULSRIN	SHARE INDIA SECURITIES LIMITED	S	500000	2.45
512591	PULSRIN	SHARE INDIA SECURITIES LIMITED	B	63016	2.37
539921	SEIL	MULTITUDE GROWTH FUNDS LIMITED	B	1058800	170
543519	SFSL	HITESH KARNAWAT	S	24000	95.7
543519	SFSL	LALIT KUMAR KARNAWAT	S	13500	96.33
543519	SFSL	SHANTA MOTILAL BHUTADA	B	36000	95.93
544646	SHIPWAVES	DANISH GAFARBHAI PANJA	B	1080000	4.49
539798	UMIYA	LUNAGARIYA VIPUL BHARATBHAI	B	369187	27.01
539798	UMIYA	RAJESHKUMAR AMRUTLAL AKHANI	S	322095	27
544406	UNIFIED	BNP PARIBAS FINANCIAL MARKETS	S	139200	330.07
544406	UNIFIED	PANKAJ PRASOON	B	140400	330.14
544508	VASHISHTHA	ROLY YOGENDRA KAUSHIK	S	31200	92.89
542803	VEL	L7 HITECH PRIVATE LIMITED	B	50000	42.97

13<sup>th</sup> January, 2026

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
BAGDIGITAL	B.A.G.Convergence Limited	ABUNDANTIA CAPITAL VCC - ABUNDANTIA CAPITAL III	SELL	600000	110.45
BAGDIGITAL	B.A.G.Convergence Limited	RAMAN TALWAR	BUY	443200	110.25
FORCEMOT	Force Motors Limited	POONAWALLA AVIATION PRIVATE LIMITED	BUY	38740	19790
FORCEMOT	Force Motors Limited	SERUM INSTITUTE OF INDIA PRIVATE LIMITED	SELL	38740	19790
KESORAMIND	KESORAM INDUSTRIES LTD	ANJANI AGARWAL	BUY	3000000	9.95
KESORAMIND	KESORAM INDUSTRIES LTD	NEO APEX VENTURE LLP	SELL	1584993	10.15
MCL	Madhav Copper Limited	NEO APEX VENTURE LLP	SELL	291731	70.87
MANGALAM	Mangalam Drug & Chem Ltd	ASHUTOSH TAPARIA	SELL	200000	40.61
MANGALAM	Mangalam Drug & Chem Ltd	SHIVKUMAR DAMANI	SELL	81999	40.61
MIRCELECTR	Mirc Electronics Ltd.	SAHASTRAA ADVISORS PRIVATE LIMITED	BUY	1877470	30.8
SINDHUTRAD	Sindhu Trade Links Ltd	MEGHDOOT VANIJYA PRIVATE LIMITED	SELL	10000000	19
SPRL	SP Refractories Limited	MANGLA SHANTILAL GADA	SELL	19200	143.7
SPRL	SP Refractories Limited	NIRAV SHANTILAL GADA	BUY	19200	143.7

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