

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	39005	38770	235	0.6%
Dow Futures	39446	39480	(34)	-0.1%
Nasdaq	16266	16019	247	1.5%
FTSE	7748	7669	79	1.0%
Nikkei	38681	38798	(117)	-0.3%
Hang Seng	17097	17094	3	0.0%
Gift Nifty	22469	22457	12	0.1%
Straits Singapore	3158	3141	17	0.5%
South Korea	2691	2682	9	0.3%
Taiwan	19925	19915	10	0.1%
Shanghai	3042	3056	(14)	-0.5%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8657	8653	4.0	0.0%
Alumin (\$/MT)	2265	2259	6.0	0.3%
Zinc (\$/MT)	2561	2567	(6.0)	-0.2%
Brent Crude (\$/bbl)	82.0	82.0	0.0	0.0%
Gold (\$/Ounce)	2160	2158	2.0	0.1%
Silver (\$/Ounce)	24.0	24.0	0.0	0.0%
Light Crude (\$/bbl)	78.0	78.0	0.0	0.0%
N G (\$/mmbtu)	2.0	2.0	0.0	0.0%
Sugar (\$/MT)	616.0	617.0	(1.0)	-0.2%
Rubber (Rs./kg)	175.0	174.0	1.0	0.6%
Baltic Dry Index	2315	2377	(62.0)	-2.6%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	82.78	82.77	0.01%
Rs./ Euro	90.49	90.50	-0.01%
Rs./Chinese Yuan	11.52	11.53	-0.09%
Yen /\$ rate	147.36	147.68	-0.22%
\$ US/Euro	1.09	1.09	0.00%

Dollar Index	Current	Previous	Var(%)
Dollar Index	102.92	102.96	-0.04%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22240	47240
Support 2	22170	47000
Resistance	22440	47800

Securities in Ban For Trade	
ABFRL	HINDCOPPER
MANAPPURAM	MGL
SAIL	TATACHEM
ZEEL	NATIONALUM
PEL	

### Market Review

**US:** US stocks notched gains across the board on Tuesday after key inflation data came in hotter than expected to help set expectations for the timing of a Fed Reserve interest-rate cut.

**Asia:** Most Asian stocks rose slightly on Wednesday as major technology shares tracked a rally in their Wall Street peers, although overall gains were limited as hot U.S. inflation factored into a higher-for-longer outlook for interest rates.

**India:** Frontline line equity indices bucked the trend in the broader market, and finished in the positive territory on Tuesday led by gains in index heavyweights - HDFC Bank, TCS and Reliance Industries. **Market is expected to open on a flattish note and likely to witness sideways move during the day**

**Global Economy:** Headline U.S. consumer price growth accelerated in Feb, while the underlying measure was faster than anticipated, in a sign of sticky inflationary pressures that could complicate the timing of potential Fed Reserve interest rate cuts this year. The annualized reading of the closely-watched CPI increased by 3.2% last month, quicker than estimates that it would remain at a pace of 3.1% notched in Jan. The British public's expectations for inflation over the next year and also the longer term fell in Feb, U.S. bank Citi said. Citi said public expectations for inflation in 12 months' time fell to 3.6% in February from 3.9% in January, while expectations for the five to 10 year period fell to 3.5% from 3.6%.

IIP output in January grew at a weaker-than-expected rate of 3.8% year-on-year on the back of slowdown in manufacturing and mining activity.

**Commodities:** Gold prices steadied on Wednesday, after posting its biggest decline in a month in the previous session after a sticky U.S. inflation report boosted bond yields and slightly tempered hopes for a June interest rate cut from the Fed Reserve.

Oil prices rose on Wednesday on expectations of strong global demand, including in the world's top consumer the United States, and as even somewhat sticky US inflation did not dent expectations the Fed might start cutting rates soon.

**Currency:** The US dollar held steady against a handful of rival currencies on Wednesday, as traders weighed what impact hotter-than-expected inflation data could have on chances of an interest rate cut at the Fed Reserve's June meeting.

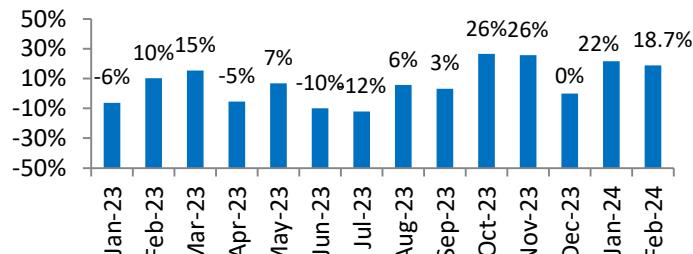
FII Derivative Transactions (Rs. Cr)																		
Contracts	Purchase		Sell		Net	Open Interest (OI)		OI (Previous day)		Change								
	Contract	Value	Contract	Value	Value	Contract	Value	Contract	Value	Contract	Value							
Index Future	58035	4842	53381	4399	443	213337	19536	202869	18785	10468	751							
Index Option	33277665	2792880	33351738	2800522	(7642)	3863822	338937	4413895	375530	(550073)	(36593)							
Stock Future	309341	25877	276011	23782	2095	3110563	253434	3142067	257359	(31504)	(3925)							
Stock Option	576815	50876	582004	51326	(450)	348662	29947	339473	29388	9189	559							
<b>Total</b>	<b>34221856</b>	<b>2874475</b>	<b>34263134</b>	<b>2880029</b>	<b>(5554)</b>	<b>7536384</b>	<b>641854</b>	<b>8098304</b>	<b>681062</b>	<b>(561920)</b>	<b>(39208)</b>							
<b>FII All Activity-BBG (Rs Cr)</b>			<b>Buy</b>	<b>Sell</b>	<b>Net</b>	<b>Corporate News</b>												
4-Mar-24			13899	13911	(12)													
5-Mar-24			14305	14526	(221)													
6-Mar-24			19942	14258	5684													
7-Mar-24			26288	15699	10589													
11-Mar-24			23303	19357	3946													
<b>Month to date-Mar</b>			<b>115977</b>	<b>93821</b>	<b>22156</b>													
<b>FII (Prov.) (Rs Cr)</b>			<b>Buy</b>	<b>Sell</b>	<b>Net</b>													
5-Mar-24			15215	14641	574													
6-Mar-24			19849	17083	2767													
7-Mar-24			22998	15694	7304													
11-Mar-24			23691	19478	4213													
12-Mar-24			15475	15402	73													
<b>Month to date- Mar</b>			<b>126480</b>	<b>112066</b>	<b>14414</b>													
<b>DII (Prov.) (Rs. Cr)</b>			<b>Buy</b>	<b>Sell</b>	<b>Net</b>													
5-Mar-24			11889	10054	1835													
6-Mar-24			13639	11489	2150													
7-Mar-24			11887	9285	2602													
11-Mar-24			10787	7549	3238													
12-Mar-24			10478	8120	2358													
<b>Month to date-Mar</b>			<b>82821</b>	<b>63325</b>	<b>19496</b>													
<b>FII Debt - BBG (Rs. Cr)</b>			<b>Buy</b>	<b>Sell</b>	<b>Net</b>													
4-Mar-24			1019	442	577													
5-Mar-24			1952	1155	797													
6-Mar-24			2777	485	2292													
7-Mar-24			5152	769	4382													
11-Mar-24			2010	1672	338													
<b>Month to date-Mar</b>			<b>14135</b>	<b>5965</b>	<b>8170</b>													
<b>Market Breadth</b>		<b>BSE</b>		<b>NSE</b>		<b>Economy</b>												
		<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>													
Advance	625	16%		414	16%													
Decline	3272	82%		2182	82%													
Unchanged	70	2%		53	2%													
<b>Market Turnover</b>		<b>12-Mar</b>		<b>11-Mar</b>		<b>Var (%)</b>	<b>Retail inflation for February remains almost unchanged at 5.09%</b>											
BSE Cash		6995		13451		-48%												
NSE Cash		98274		99342		-1%												
NSE Futures		143212		129310		11%												
NSE Options		47448261		23589463		101%												
Total (Rs.Cr)		47696741		23831567		100%												
<b>Volatility Index</b>		<b>12-Mar</b>		<b>11-Mar</b>		<b>India's retail inflation for the month of February 2024 stayed flat at 5.09 per cent against 5.1 per cent recorded for the month of January, according to government's official data. However, the number signifies a significant cooling on a year on year (YoY) basis as India's consumer price index (CPI) for February 2023 was recorded at 6.44 per cent. (TIE)</b>												
Volatility Index		13.64		14.00														
<b>Index PE - TTM</b>		<b>12-Mar</b>		<b>Yr. High</b>		<b>Yr. Low</b>	<b>International</b>											
Sensex		25.2		26.0		21.8												
Nifty		23.1		28.8		20.0												

#### CME Group bids to enter US Treasuries clearing business

CME Group plans to apply to clear U.S. Treasuries, a \$26 trillion dollar market. CME Group would apply this year to clear U.S. Treasuries, becoming the first exchange company to publicly announce its plans to enter the world's biggest bond market. CME operates CME Clearing, which offers clearing and settlement services for exchange-traded contracts and over-the-counter derivatives transactions. The exchange operator also offers global benchmark products across major asset classes, including futures and options. (INV)

Top 5 Nifty Gainers	12-Mar	11-Mar	Var(%)
HDFCBANK	1460	1428	2.2%
TCS	4192	4122	1.7%
LTIM	5209	5123	1.7%
MARUTI	11510	11396	1.0%
INFY	1613	1601	0.8%
Top 5 Nifty Losers	12-Mar	11-Mar	Var(%)
ADANIENT	3123	3207	-2.6%
CIPLA	1466	1504	-2.5%
GRASIM	2184	2237	-2.4%
ADANIPORTS	1301	1327	-1.9%
SBIN	760	774	-1.8%

**Hero Moto: Monthly Sales Volume Growth (YoY)**  
(Source: Company Data)



BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	73668	0.2%	-0.3%	3.0%	26.5%
MIDCAP	39238	-1.3%	-2.0%	1.2%	62.3%
SMLCAP	42831	-2.1%	-5.9%	-3.3%	56.5%
AUTO	47948	-0.3%	0.3%	7.1%	66.9%
BANKEX	53666	-0.2%	-0.5%	3.8%	19.8%
Capital Goods	58353	-1.3%	-1.5%	7.3%	71.6%
FMCG	19215	-1.0%	-1.6%	-0.1%	18.5%
Health Care	34522	-1.2%	-0.7%	-2.2%	60.7%
IT	37692	0.4%	-0.8%	-2.6%	30.2%
METAL	27958	-1.3%	-1.3%	5.1%	44.0%
Oil & Gas	28122	-0.5%	-2.6%	2.7%	60.1%
Power	6660	-1.4%	-2.3%	5.5%	85.6%
Realty	6900	-3.5%	-5.7%	2.8%	120.9%

10 year G-Sec Yield	Current	Previous	Change
US	4.14%	4.15%	(1) bps
Japan	0.77%	0.77%	0 bps
India	7.03%	7.02%	1 bps
UK	3.95%	3.97%	(2) bps
Libor 3 Mths	5.58%	5.58%	0 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	5.09%	5.10%	(1) bps

India GDP	Q3FY24	Q2FY24	Var(%)
Growth	8.36%	7.60%	76 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)	251	-405	656.0

IIP Growth %	Jan-24	Jan-23	Apr-Feb
IIP	3.8	5.8	6.0
Mining	5.9	9.0	8.5
Manufacturing	3.2	4.5	5.7
Electricity	5.6	12.7	7.0

Sectors	TTM PE
Auto	31.56
Auto Ancillary	44.57
Banking	16.25
Engineering	39.09
Cement	82.79
Diamonds & Jewellery	42.26
Housing Finance	20.11
Infrastructure & Const	34.21
Metals-Aluminium	42.76
Metal - Steel	17.08
Oil Expl.	18.85
Pharma	13.09
Power – Gen. Supp.	47.09
Information Tech.	21.24
Sugar	15.02
Telecom Serv. Prov.	80.15
Tyres	27.74

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	19.42	11415938	19.22	8544227	1.04%	1	1607.49	1612.95	-0.3%
Wipro	6.17	1947978	6.13	1482129	0.65%	1	510.72	510.85	0.0%
Dr.Reddy's	76.32	136752	77.26	118670	-1.22%	1	6317.39	6302.15	0.2%
ICICI Bank	26.13	2693593	26.08	3130187	0.19%	2	1081.46	1076.85	0.4%
HDFC Bank	57.00	4407703	55.90	3373798	1.97%	3	1572.73	1459.55	7.8%

GDR's (US\$)				
	Prices	Prev. Close	Change	Var %
L&T	43.70	44.00	(0.3)	-0.7%
RIL	72.10	71.20	0.9	1.3%
SBI	91.70	93.20	(1.5)	-1.6%

Economic Calendar	Date
Indian GDP Data	31 May
Indian Inflation Data CPI	12 Apr
Indian Inflation Data WPI	14 Mar
Indian Monetary Policy	05 Apr
India's Industrial Production (IIP)	12 Apr
US Inflation Data	To Be Announced
US GDP	28 Mar
US Unemployment Data	05 Apr
US Fed Rate	20 Mar
China GDP	16 Apr
China Inflation Data	11 Apr

US Economy Data	Current	Previous
Inflation (%) (YoY)	3.20%	3.10%
Unemployment (%)	3.90%	3.70%
Interest Rate (%)	Current	Previous
Fed Rate	5.50%	5.50%
US GDP	Q4CY23	Q3CY23
Growth (QoQ Annualized)	3.20%	4.90%
China Economy Data	Current	Previous
GDP	5.20%	4.90%
Inflation – CPI (%)	0.70%	-0.80%

## Bulk Deal As On 12/03/24

## BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
513119	ABCGAS	ROHITH SATISH SHOREWALA	S	10000	60.1
539506	ADCON	TOPGAIN FINANCE PRIVATE LIMITED	S	1000000	0.85
543377	ADISHAKTI	VIVEK KANDA	S	30000	10.5
526433	ASMTEC	CAPRI GLOBAL HOLDINGS PRIVATE LIMITED	B	100000	1037.5
526433	ASMTEC	IDS SYSTEMS LLP	S	94026	1037.5
512149	AVANCE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	9995918	1.68
543209	BILLWIN	VAISHALI K SONEKAR	B	21000	67.54
530249	BRIDGESE	RONAKKUMAR SANJAYBHAI PATEL	S	19621	22.78
530249	BRIDGESE	SHRENI ANKIT MEHTA	B	25000	23.13
539596	DELTA	PARESH DHIRAJLAL SHAH	B	30000	28.54
539596	DELTA	USHA KIRAN SHARMA	S	30000	28.54
531364	EKANSH	B K BAJAJ & OTHERS	S	140000	55
531364	EKANSH	GENESIS GRAND GENERAL TRADING L.L.C	B	244640	54.99
504351	EMPOWER	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	8752644	3.79
504397	GANHOLD	KAPIL RASTOGI	S	2253	85.07
509563	GARWAMAR	POSHATTIWAR SANDEEP VASANTRAO HUF	S	30341	12.4
538788	GILADAFINS	SHARAD SHYAM SONI HUF	B	90000	12.09
538788	GILADAFINS	SHYAMSUNDER MADANLAL SONI (HUF)	S	107200	12.09
513309	GOLKONDA	GRID TRADING PRIVATE LIMITED	B	248665	15.5
513309	GOLKONDA	UTPAL AGRAWAL	S	250000	15.5
504731	IBRIGST	MEGHNA JIGAM GANDHI	S	5147	146.8
524614	INDXTRA	ROMIT CHAMPAKAL SHAH	S	170000	9.68
541983	INNOVATIVE	VISHAL BHANDARI	S	78000	26.92
538564	JAMESWARREN	A&S TRADELINK	B	21000	224.99
538564	JAMESWARREN	PARTH COMMODITY SERVICES PRIVATE LIMITED	S	20206	225
521238	KDL	KANTA DEVI SAMDARIA	S	5000	124.95
521238	KDL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	3365	124.95
521238	KDL	PARESH DHIRAJLAL SHAH	B	2840	124.95
543720	KFINTECH	KOTAK MAHINDRA BANK LIMITED	S	3470000	600.28
539762	MEAPL	MANOJ KUMAR KANDA	S	25030	82.58
539762	MEAPL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	40000	82.58
539762	MEAPL	RAGHAV KAROL HUF	B	82401	82.58
539938	MIL	ATULBHAI AMRITAL MEHTA	B	90000	57.2
539938	MIL	RISI FINSTOCK PVT LTD	S	108657	57.2
543262	MRP	ANMOL COMTRADE	S	123000	48.25
543262	MRP	MANISH KUMAR JAIN	B	60000	48
543262	MRP	RAKSHA JAIN	B	63000	48.5
500307	NIRLON	ALFANO PTE. LTD.	S	923201	430
500307	NIRLON	KUNAL VIRENCHEE SAGAR	S	1329750	430
500307	NIRLON	NIHAR NANDAN NILEKANI	B	2252041	430
512489	OASISSEC	GUTTIKONDA VARA LAKSHMI	B	10000	147.7
511644	OMEGAIN	SOMANI VENTURES AND INNOVATIONS LIMITED	B	3000	370.1
541601	RAJNISH	GEETANJALI GUNAJI MEDHEKAR	S	3201378	8.62
541601	RAJNISH	GEETANJALI GUNAJI MEDHEKAR	B	3936119	8.69
538975	SHREESEC	FABER TREXIM PRIVATE LIMITED	S	4371744	0.37
507998	SIMMOND	DEEPANKAR MAHENDRAKUMAR MOGHA	S	63957	67.01
516038	SOMAPPR	PRATIK RAJENDRA GANDHI	S	14000	54.09

543924	SONALIS	ABHIJITH PUTTA	B	40000	29.62
543924	SONALIS	KHATNANI VISHAL	B	12000	29.62
543924	SONALIS	MEHUL BHARATBHAI SHAH HUF	S	42000	29.62
543745	SVS	FINVENTION FINVEST PRIVATE LIMITED	S	132000	8.4
543745	SVS	GUNJAN NITINKUMAR NAYAK	B	132000	8.4
539310	THINKINK	AMAYSHA TEXTILES PRIVATE LIMITED	B	1420000	44.88
539310	THINKINK	AVANTIKA ADVISORY SERVICES LLP	S	324840	44.64
539310	THINKINK	BHARATH KUMAR PALATLA	S	200000	45
539310	THINKINK	BIPINBHAI DEVABHAI RAVAL	S	525412	45.04
539310	THINKINK	BIPINBHAI DEVABHAI RAVAL	B	544742	44.76
539310	THINKINK	BOFA SECURITIES EUROPE SA	S	196156	45.13
539310	THINKINK	GIRIRAJ RATAN DAMANI	S	225000	44.64
539310	THINKINK	HARDIK DISTRIBUTOR PRIVATE LIMITED	S	421621	45.25
539310	THINKINK	HARDIK DISTRIBUTOR PRIVATE LIMITED	B	421621	44.75
539310	THINKINK	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	250003	44.64
539310	THINKINK	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	250003	44.73
539310	THINKINK	MUNISH KUMAR	S	156000	44.64
539310	THINKINK	SOCIETE GENERALE	S	235761	45.49
533629	TIJARIA	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	B	362186	15.87
531411	TUNITEX	NITIN BAKSHI	B	753488	2.11
541338	UHZAVERI	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	100000	36.83
532402	USGTECH	RITU AGGARWAL	B	213000	7
511523	VEERHEALTH	YOGESH MAHASUKLAL SHAH	B	150000	20.5
542803	VEL	KAILASH KABRA	S	200000	11.25
542803	VEL	SAROJDEVI SATYANARAYAN KABRA	S	275000	11.2
542803	VEL	VEENA RAJESH SHAH	B	475000	11.22

**NSE**

Security Code	Security Name	Client Name	Deal	Quantity	Price
AARTECH	Aartech Solonics Limited	CHANAKYA OPPORTUNITIES FUND I	BUY	60000	155.5
CMMIPL	CMM Infraprojects Limited	SAMTA MUNDRA	SELL	108000	2.15
ESCONET	Esconet Technologies Ltd	VORA FINANCIAL SERVICES PVT LTD	SELL	94400	160.86
HIGREEN	Hi Green Carbon Limited	STELLAR WEALTH PARTNERS INDIA FUND I LP	BUY	139200	169.96
HILTON	Hilton Metal Forging Limi	UJWALA PRAKASH JAIN	SELL	167000	149.22
INDTERRAIN	Ind Terrain Fashions Ltd	POLARIS BANYAN HOLDING PRIVATE LTD	BUY	305000	76.53
INFIBEAM	Infibeam Avenues Limited	ABHISHEK MAYUR DESAI	SELL	6000000	39.6
INFIBEAM	Infibeam Avenues Limited	SONAL DESAI	BUY	6000000	39.6
INSPIRE	Inspire Films Limited	HARIT EXPORTS PRIVATE LIMITED	SELL	100000	35.6
INSPIRE	Inspire Films Limited	MOHIT RAMGOPAL AGRAWAL	BUY	100000	35.6
MAANALU	Maan Aluminium Limited	MANSUKH SECURITIES & FINANCE LTD	BUY	700000	152.5
MAANALU	Maan Aluminium Limited	RAVINDER NATH JAIN	SELL	1000000	152.55
LODHA	Macrotech Developers Ltd	SAMBHAVNATH INFRABUILD AND FARMS PRIVATE LIMITED	SELL	4972100	1180.02
MADHAV	Madhav Marbles and Grani	PARNIKA AGARWAL	SELL	45561	38.33
MDL	Marvel Decor Limited	GINNI FINANCE PVT. LTD.	BUY	138000	90.4
ONWARDTEC	Onward Technologies Ltd	WHITE OAK INDIA EQUITY FUND IV	SELL	125248	463.81
SAHAJ	Sahaj Fashions Limited	MAYURI SHRIPAL VORA	SELL	68000	21.81
TIJARIA	Tijaria Poly pipes Ltd	JYOTIKA DEEPAK SHENOY	SELL	385000	15
TIJARIA	Tijaria Poly pipes Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	400000	15
TIJARIA	Tijaria Poly pipes Ltd	NAV CAPITAL VCC - NAV CAPITAL EMERGING STAR FUND	BUY	325090	15.6
TIJARIA	Tijaria Poly pipes Ltd	SETU SECURITIES PVT LTD	BUY	225000	15
VR	V R Infraspace Limited	ADANI ATUL KANTILAL	BUY	59200	90.1
VR	V R Infraspace Limited	ALPESH BHUPATBHAI VAGHSIYA	BUY	65600	90
VR	V R Infraspace Limited	BHUMIKABEN SUNILBHAI PATEL	BUY	222400	87.51
VR	V R Infraspace Limited	GOENKA BUSINESS & FINANCE LIMITED	BUY	57600	87.8
VR	V R Infraspace Limited	PRITESH RAMNIKBHAI GAJERA	BUY	54400	89.75
VR	V R Infraspace Limited	THAKKAR DHIRAJLAL VITTHALDAS	BUY	54400	90
VR	V R Infraspace Limited	VIPULBHAI ARVINDBHAI SHINGALA	BUY	59200	89.32
S VIJIFIN	Viji Finance Limited	VIJAY KOTHARI	BUY	446000	3.65

**Disclosure:**

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