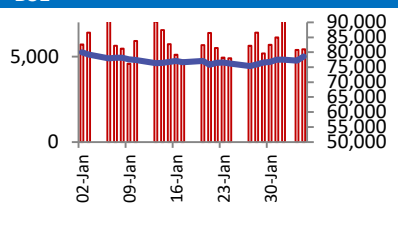
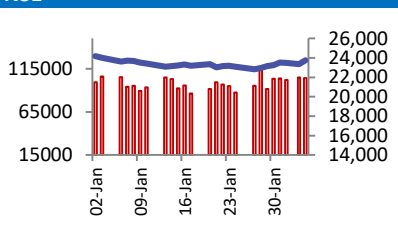


BSE		NSE																													
	<table border="1"> <tr><td>Open</td><td>77688</td></tr> <tr><td>High</td><td>78659</td></tr> <tr><td>Low</td><td>77402</td></tr> <tr><td>Close</td><td>78584</td></tr> <tr><td>Change</td><td>1397</td></tr> <tr><td>Volume (Lacs)</td><td>4938</td></tr> <tr><td>Turnover (Rs.inCr)</td><td>5429</td></tr> </table>	Open	77688	High	78659	Low	77402	Close	78584	Change	1397	Volume (Lacs)	4938	Turnover (Rs.inCr)	5429		<table border="1"> <tr><td>Open</td><td>23510</td></tr> <tr><td>High</td><td>23763</td></tr> <tr><td>Low</td><td>23423</td></tr> <tr><td>Close</td><td>23739</td></tr> <tr><td>Change</td><td>378</td></tr> <tr><td>Volume(Lacs)</td><td>31272</td></tr> <tr><td>Turnover(Rs.in Cr)</td><td>104199</td></tr> </table>	Open	23510	High	23763	Low	23423	Close	23739	Change	378	Volume(Lacs)	31272	Turnover(Rs.in Cr)	104199
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World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44556	44422	134	0.3%
Dow Futures	44628	44697	(69)	-0.2%
Nasdaq	19654	19392	262	1.4%
FTSE	8571	8584	(13)	-0.1%
Nikkei	38727	38798	(71)	-0.2%
Hang Seng	20579	20790	(211)	-1.0%
Gift Nifty	23840	23848	(8)	0.0%
Straits Singapore	3816	3823	(7)	-0.2%
South Korea	2507	2482	25	1.0%
Taiwan	23189	22794	395	1.7%
Shanghai	3240	3251	(11)	-0.3%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9151	9099	52	0.6%
Alumin (\$/MT)	2638	2623	15	0.6%
Zinc (\$/MT)	2808	2799	9	0.3%
Brent Crude (\$/bbl)	76	76	(0)	-0.4%
Gold (\$/Ounce)	2849	2843	7	0.2%
Silver (\$/Ounce)	32	32	(0)	0.0%
Light Crude (\$/bbl)	73	73	(0)	-0.3%
N G (\$/mmbtu)	3	3	(0)	-1.0%
Sugar (\$/MT)	512	503	8	1.6%
Rubber (Rs./kg)	192	193	(1)	-0.3%
Baltic Dry Index	753	738	15	2.0%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	87.08	87.20	-0.14%
Rs./ Euro	90.03	89.19	0.94%
Rs./ Chinese Yuan	11.89	11.91	-0.10%
Yen / \$ rate	153.34	154.34	-0.65%
\$ US/Euro	1.04	1.04	0.04%

Dollar Index	Current	Previous	Var(%)
Dollar Index	107.87	107.96	-0.08%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	23670	50000
Support 2	23540	49740
Resistance	23800	50540

Securities in Ban For Trade
NIL

Market Review

US: Wall Street futures took a knock from a sharp drop in Alphabet shares as earnings disappointed.

Asia: Asian stock markets tried to steady on Wednesday amid hopes U.S. tariffs would not be as painful for the global economy as feared just a day ago.

India: Market ended with gains of over a per cent each on Tuesday. Banking shares stole the show among sectors, with Nifty PSU and Pvt Bank indices ending higher by over 2 per cent each. **Market is expected to open on a positive note and likely to witness positive move during the day.**

Global economy: China's services activity missed expectations in Jan, PPI index data, as local business activity took only fleeting support from recent stimulus measures. The Caixin services PMI read 51 in Jan, missing expectations of 52.3. The reading also slowed from the 52.2 seen in the prior month. The softer services print was driven chiefly by slower growth in new business, as activity cooled from highs seen during the year-end holidays. While the recent Lunar New Year holiday is expected to have spurred some growth, this will only be reflected in Feb's reading.

The inventory levels of U.S. crude oil, gasoline, and distillates stocks have seen a significant increase. The actual number came in at 5.025 mn, which is a substantial rise from the forecasted figure of 3.170 mn. This surge not only surpassed the forecast but also eclipsed the previous number of 2.860 million.

Commodities: U.S. crude prices fell by nearly 2% on Tuesday as U.S. tariffs on China took effect, though President Donald Trump paused for a month a decision on steep levies on neighbors Canada and Mexico.

Gold prices touched an all-time-high on Wednesday, underpinned by safe-haven demand after China responded to U.S. tariffs, which were initially imposed by Trump on the world's largest consumer of gold.

Currency: The dollar was on the back foot in the early Asian session, giving some respite to heavily battered currencies like the euro, which bounced back above the \$1.02 level and last bought \$1.0374.

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	59323	10109	28610	4755	5354	230804	38242	232933	38022	(2129)	220
Index Option	6986120	1216104	6925350	1207081	9023	2906929	502351	2824966	481593	81963	20758
Stock Future	566185	34690	443642	27216	7474	5581180	349724	5661969	350308	(80789)	(584)
Stock Option	1127861	71310	1162738	73301	(1991)	901579	54363	801922	47619	99657	6744
Total	8739489	1332213	8560340	1312353	19860	9620492	944680	9521790	917542	98702	27138

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
28-Jan-25	13195	16136	(2941)
29-Jan-25	8230	10026	(1796)
30-Jan-25	15114	16868	(1754)
31-Jan-25	18093	18094	(1)
3-Feb-25	14406	18034	(3628)
Month to date- Feb	14406	18034	(3628)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
30-Jan-25	10514	15097	(4583)
31-Jan-25	14000	15189	(1189)
1-Feb-25	988	2315	(1327)
3-Feb-25	12506	16464	(3958)
4-Feb-25	18106	17297	809
Month to date-Feb	31599	36075	(4476)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
30-Jan-25	13934	11768	2166
31-Jan-25	13550	11317	2232
1-Feb-25	13364	12540	824
3-Feb-25	19319	16611	2708
4-Feb-25	15003	15433	(431)
Month to date-Feb	47686	44584	3102
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
28-Jan-25	5478	1697	3781
29-Jan-25	2050	1544	506
30-Jan-25	1679	624	1054
31-Jan-25	12328	2730	9598
3-Feb-25	2945	1002	1943
Month to date- Feb	2945	1002	1943

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2422	59%	1920	67%
Decline	1499	37%	875	31%
Unchanged	152	4%	66	2%

Market Turnover	04-Feb	03-Feb	Var (%)
BSE Cash	5429	5384	1%
NSE Cash	104199	104886	-1%
NSE Futures	153484	134350	14%
NSE Options	13477074	10378589	30%
Total (Rs.Cr)	13740185	10623209	29%

Volatility Index	04-Feb	03-Feb
Volatility Index	14.02	14.35

Index PE - TTM	04-Feb	Yr. High	Yr. Low
Sensex	22.4	25.7	21.5
Nifty	21.6	24.4	20.8

Corporate News

RVNL Secures Rs 404-Cr Road Doubling Project From East Coast Railway

Rail Vikas Nigam Ltd. received letter of acceptance from East Coast Railway for a Rs 404.4-cr road doubling project. The project involves "earth work in formation of approaches, protection works and other connected miscellaneous works between Tikiri and Bhalumaska stations. The project is expected to be completed within a timeframe of 30 months. (NDTV)

Affle (India) granted 12th patent for advanced AI technology

The firm granted another patent in India which helped its overall IP portfolio. Patent subject area includes system for switching and handover between one or more intelligent conversational agents. (NDTV)

Ujjivan SFB applies for a universal banking licence to expand offerings

Ujjivan Small Finance Bank submitted an application to the RBI seeking a universal banking licence to strengthen its offerings and its position in the sector. The Bengaluru-based lender is the second SFB after AU SFB to apply for a universal banking licence under the voluntary transition route. (BS)

Economy

FY25 target to fund projects via green bonds pruned 27%

The government has reduced its FY25 target for green bond proceeds by 27% due to weak investor interest and plans to maintain this level for the next fiscal year. Despite the ongoing effort to promote green financing, the anticipated premium over non-green instruments has been minimal since the bonds' debut in FY23. (ET)

RBI buys 72.6 tonnes gold in CY 2024

In 2024, RBI expanded its gold reserves by 72.6 tonnes, reaching a total of 876.18 tn valued at \$66.2 bn. This increase is the highest since 2021 and the second highest since 2017. The central bank's gold purchases help protect against currency volatility and enhance valuation gains on reserves. (ET)

International

Walmart to cut jobs, relocate staff to central offices

Walmart Inc is cutting corporate jobs and asking employees from smaller offices to relocate to its main hubs in Bentonville, Arkansas, or Sunnyvale, California, as part of its ongoing corporate consolidation. The retailer will shut its office in Charlotte, North Carolina, and eliminate hundreds of corporate roles, Bloomberg reported citing an internal memo seen by it. (Inv)

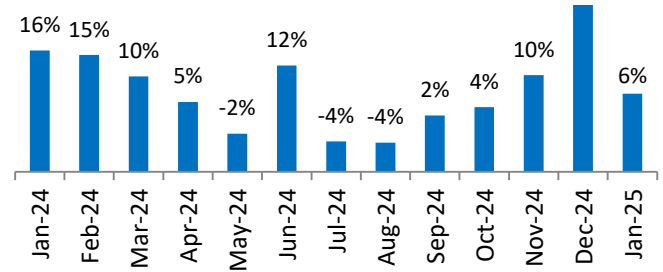
Top 5 Nifty Gainers	04-Feb	03-Feb	Var(%)
SHRIRAMFIN	577	546	5.6%
LT	3439	3289	4.6%
BEL	285	274	3.8%
ADANIPTS	1125	1085	3.7%
INDUSINDBK	1047	1013	3.4%
Top 5 Nifty Losers	04-Feb	03-Feb	Var(%)
TRENT	5750	6135	-6.3%
BRITANNIA	5028	5106	-1.5%
HEROMOTOCO	4237	4287	-1.2%
NESTLEIND	2299	2317	-0.8%
EICHERMOT	5450	5485	-0.6%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	78584	1.8%	2.7%	-0.8%	9.6%
MIDCAP	43075	1.3%	1.7%	-8.2%	10.6%
SMLCAP	49801	1.2%	1.5%	-11.3%	8.9%
AUTO	52867	1.0%	4.1%	-2.4%	18.0%
BANKEKX	57060	2.2%	2.1%	-1.5%	10.2%
Capital Goods	61948	3.4%	3.0%	-9.2%	11.4%
FMCG	20789	-0.1%	3.7%	-1.6%	5.3%
Health Care	42561	1.6%	3.4%	-6.1%	24.5%
IT	42190	1.4%	0.3%	-3.4%	11.3%
METAL	28033	1.6%	-0.1%	-4.0%	1.6%
Oil & Gas	24948	2.4%	1.8%	-7.0%	-9.4%
Power	6313	2.3%	-0.6%	-10.3%	-2.9%
Realty	7409	0.4%	7.5%	-9.4%	8.7%

NSE USD Futures	04-Feb	03-Feb	Var (%)
Feb Expiry (Rs./\$)	84.77	84.77	0.0%
Mar Expiry (Rs./\$)	84.86	84.86	0.0%
Total Turnover (Rs. Crore)	2614	2466	6%

Sectors	TTM PE
Auto	31.86
Auto Ancillary	41.71
Banking	13.24
Engineering	46.03
Cement	83.15
Diamonds & Jewellery	50.65
Housing Finance	24.62
Infrastructure & Const	32.67
Metals-Aluminium	28.04
Metal – Steel	16.22
Oil Expl.	12.27
Pharma	9.58
Power – Gen. Supp.	39.84
Information Tech.	27.22
Sugar	21.58
Telecom Serv. Prov.	61.29
Tyres	26.14

Maruti Monthly Volume Growth (YoY)
(Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.51%	4.51%	0 bps
Japan	1.30%	1.28%	2 bps
India	6.67%	6.67%	1 bps
UK	4.52%	4.49%	4 bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	630	630	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)	-1204	-1121	(82.8)

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	22.38	9778160	21.99	10983105	1.77%	1	1948.77	1898.80	2.6%
Wipro	3.72	4855047	3.68	6239845	1.09%	1	323.92	316.25	2.4%
Dr.Reddy's	13.84	1460430	13.61	1744721	1.69%	1	1205.13	1219.95	-1.2%
ICICI Bank	29.18	2601069	28.81	2601333	1.28%	2	1270.44	1268.20	0.2%
HDFC Bank	61.10	1865629	59.87	1871269	2.05%	3	1773.45	1720.90	3.1%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	39.30	37.50	1.8	4.8%
RIL	59.30	57.50	1.8	3.1%
SBI	89.10	87.10	2.0	2.3%

US Economy Data	Current	Previous
Inflation (%) (YoY)	2.90%	2.70%
Unemployment (%)	4.10%	4.20%

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 (%)	0.10%	0.20%

Economic Calendar	Date
Indian GDP Data	28 Feb
Indian Inflation Data CPI	12 Feb
Indian Inflation Data WPI	14 Feb
Indian Monetary Policy	07 Feb
India's Industrial Production (IIP)	12 Feb
US Inflation Data	12 Feb
US GDP	27 Feb
US Unemployment Data	07 Feb
US Fed Rate	19 Mar
China GDP	16 Apr
China Inflation Data	09 Feb

Event Update

Name	Date	Purpose
GTV Engineering Ltd.	05/02/25	Rs.0.50 per share(5%)Interim Dividend
Indian Metals & Ferro Alloys Ltd.	05/02/25	Rs.5.00 per share(50%)Second Interim Dividend
Manba Finance Ltd.	05/02/25	Rs.0.25 per share(2.5%)Second Interim Dividend
MAS Financial Services Ltd.	05/02/25	Rs.1.00 per share(10%)Interim Dividend
Shree Cement Ltd.	05/02/25	Rs.50.00 per share(500%)Interim Dividend
SMC Global Securities Ltd.	05/02/25	Interim Dividend
Sona BLW Precision Forgings Ltd.	05/02/25	Rs.1.60 per share(16%)Interim Dividend
Thinkink Picturez Ltd.	05/02/25	Bonus issue
India Motor Parts & Accessories Ltd.	06/02/25	Rs.10.00 per share(100%)Interim Dividend
IRB Infrastructure Developers Ltd.	06/02/25	Third Interim Dividend
KSolves India Ltd.	06/02/25	Stock Split from Rs.10/- to Rs.5/-
Minolta Finance Ltd.	06/02/25	Stock Split from Rs.10/- to Re.1/-
Sharda Cropchem Ltd.	06/02/25	Rs.3.00 per share(30%)Interim Dividend
Shashijit Infraprojects Ltd.	06/02/25	E.G.M.
Sun Pharmaceutical Industries Ltd.	06/02/25	Interim Dividend
AGI Infra Ltd.	07/02/25	Stock Split from Rs. 10/- to Rs.5/-
Clean Science And Technology Ltd.	07/02/25	Rs.2.00 per share(200%)Interim Dividend
Computer Age Management Services Ltd.	07/02/25	Rs.17.50 per share(175%)Interim Dividend
Epigral Ltd.	07/02/25	Rs.2.50 per share(25%)Interim Dividend
GAIL (India) Ltd.	07/02/25	Rs.6.50 per share(65%)Interim Dividend
Garden Reach Shipbuilders & Engineers Ltd.	07/02/25	Interim Dividend
Gateway Distriparks Ltd.	07/02/25	Second Interim Dividend
Jasch Gauging Technologies Ltd.	07/02/25	Rs.5.00 per share(50%)Interim Dividend
Julien Agro Infratech Ltd.	07/02/25	Rs.0.05 per share(1%)Second Interim Dividend
Kirloskar Pneumatic Company Ltd.	07/02/25	Rs.3.50 per share(175%)Interim Dividend
Marico Ltd.	07/02/25	Interim Dividend
Nestle India Ltd.	07/02/25	Second Interim Dividend

Bulk Deal As On 04/02/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539528	AAYUSH	ALIA COMMOSALES LLP	B	344688	54.33
539528	AAYUSH	MOONLIGHT MULTITRADE LLP	S	500000	54.33
538716	ARYACAPM	ARVIND KUMAR BANSAL (HUF)	B	90000	214
538716	ARYACAPM	GANGA DEVI BANSAL	S	75000	214
524516	BACPHAR	ALPESHMOHANBHAIMUNGARA	B	42565	43.1
524516	BACPHAR	GB LOGISTICS COMMERCE LIMITED	S	30000	43.5
543439	BRANDBUCKT	PRATIKSHA SANTOSH SHENKAR	S	544000	8.76
543439	BRANDBUCKT	VINUTHA DAMODAR POOJARY	B	160000	8.76
544349	HMEML	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	80000	80.41
544351	MALPANI	ANKITA DHAVALKUMAR SHAH	B	67200	85.9
544351	MALPANI	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	67200	81.61
544351	MALPANI	NEHAL BHAVESH SHAH	B	67200	85.9
544351	MALPANI	ROHIT YADAV	B	123200	88
543579	NATURO	MINOLLO PRIVATE LIMITED	S	172000	5.9
543579	NATURO	PREMRATAN 0 DAMANI	B	196000	5.87
531512	ORIENTTR	YAKSHIT FINANCE LIMITED	B	62000	34.25
500317	OSWALAGRO	DENVER TRADING COMPANY PRIVATE LIMITED	S	1341327	69
500317	OSWALAGRO	JALAVEG INVESTMENT AND TRADING COMPANY LIMITED	S	3447309	69
500317	OSWALAGRO	OSWAL GREENTECH LIMITED	B	6682109	69
500317	OSWALAGRO	TUSHAR HOLDINGS LIMITED	S	1300292	69
519299	PRIMIND	ARTI MISHRA	B	100000	140.92
540703	PROCLB	UDAY R SHAH HUF	B	45000	34.69
512591	PULSRIN	SHAILESH DHAMELIYA	S	596143	20.94
512591	PULSRIN	SHAILESH DHAMELIYA	B	587953	20.93
536659	PVVINFRA	RISHI DINESHBHAI PAREKH HUF	S	300000	7.04
536659	PVVINFRA	SUNKESULA INFRA LLP	B	373371	7.11
511116	QUADRANT	IDBI TRUSTEESHIP SERVICES LTD	S	3111181	0.52
543897	SANCODE	COSMOS PRIME PROJECTS LIMITED	S	42000	58.8
543897	SANCODE	ZNL STARTUP ACCELERATOR LLP	B	42000	58.8
539124	SARVOTTAM	PRIYASHA MEVEN FINANCE LTD.	S	35256	20.59
539124	SARVOTTAM	PRIYASHA MEVEN FINANCE LTD.	B	52511	20
539124	SARVOTTAM	TRADETASTIC FINTECH LLP	S	100000	21.13
540147	SHASHIJIT	SNEHA JHUNJHUNWALA	S	400000	4.65
539117	SUJALA	YAKSHIT FINANCE LIMITED	B	30000	79.59
523752	TIHL	PAYEL KABIRAJ	S	200000	20.44
521005	TITANIN	ASHOK DILIPKUMAR JAIN	S	640243	17.64
521005	TITANIN	BYTE DEVELOPERS PRIVATE LIMITED	B	183500	17.63
521005	TITANIN	DEVI TRADERS LLP	S	363697	17.66
521005	TITANIN	DEVI TRADERS LLP	B	363697	17.38
521005	TITANIN	KAJAL ASHOK JAIN	S	526800	17.76
521005	TITANIN	KALIDAS VJAY MAGAR	S	168000	18.02
531015	VENMAX	GREEN PEAKS ENTERPRISES LLP	B	47656	30.88
506122	VOLKAI	GLADIS MENEZES	S	4227	273.25
506122	VOLKAI	RAVISH MALAV	B	5000	273.25
506122	VOLKAI	VINAYAKMISHRA	S	3737	273.25
523650	YASHINNO	ARPITA BIREN SHAH	S	46313	29.44

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ATL	Allcargo Terminals Ltd	DIVYA JIGAR SANGHVI	BUY	1825000	31.98
ATL	Allcargo Terminals Ltd	RAAJDEEP ENTERPRISES	SELL	1825000	31.98
COMMITTED	Committed Cargo Care Ltd	DB INTERNATIONAL STOCK BROKERS LIMITED	BUY	56000	189.37
PSFL	Paramount Speciali Forg L	SANDEEP SINGH	BUY	112000	67.45
SABEVENTS	Sab Events & Governance	AJCON GLOBAL SERVICES LIMITED	BUY	52500	5.6
SABEVENTS	Sab Events & Governance	INDIAN OVERSEAS BANK	SELL	575311	5.6
SABEVENTS	Sab Events & Governance	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	400000	5.6
VETO	Veto Switchgear Cable Ltd	L7 HITECH PRIVATE LIMITED	BUY	137730	121.5
ZIMLAB	Zim Laboratories Limited	ELIMATH ADVISORS PRIVATE LIMITED	SELL	900000	99.85
ZIMLAB	Zim Laboratories Limited	ELIZABETH MATHEW	BUY	900000	99.85

Disclosure:

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