

## 06th February, 2025

23802

23807

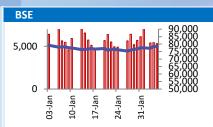
23680

23696

29912

94512

-43



Open	78705
High	78735
Low	78216
Close	78271
Change	-313
Volume (Lacs)	5306
Turnover (Rs.inCr)	5319

Reserve.



World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44873	44556	317	0.7%
Dow Futures	45062	45004	58	0.1%
Nasdaq	19692	19654	38	0.2%
FTSE	8623	8571	53	0.6%
Nikkei	38888	38831	57	0.1%
Hang Seng	20720	20597	123	0.6%
Gift Nifty	23807	23805	3	0.0%
Straits Singapore	3836	3815	21	0.5%
South Korea	2526	2509	17	0.7%
Taiwan	23274	23162	113	0.5%
Shanghai	3246	3229	16	0.5%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9240	9151	90	1.0%
Alumin (\$/MT)	2616	2638	(22)	-0.8%
Zinc (\$/MT)	2780	2808	(28)	-1.0%
Brent Crude (\$/bbl)	75	75	0	0.3%
Gold (\$/Ounce)	2870	2867	3	0.1%
Silver (\$/Ounce)	32	32	(0)	-0.1%
Light Crude (\$/bbl)	71	71	0	0.4%
N G (\$/mmbtu)	3	3	(0)	-1.0%
Sugar (\$/MT)	512	512	1	0.1%
Rubber (Rs./kg)	191	192	(1)	-0.5%
Baltic Dry Index	771	753	18	2.4%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	87.46	87.08	0.44%
Rs./ Euro	91.01	90.03	1.08%
Rs./Chinese Yuan	12.03	11.89	1.14%
Yen /\$ rate	152.23	152.61	-0.25%
\$ US/Euro	1.04	1.04	-0.09%

Dollar Index	Current	Previous	Var(%)
Dollar Index	107.66	107.58	0.07%

Support/ Resistance Levels for Today							
Nifty Bank Nifty							
Support 1	23640	50240					
Support 2	23570	50000					
Resistance	23770	50770					

Securities in Ban For Trade	
NIL	

# Market Review US: All three major stock indexes closed higher on Wednesday, rebounding from declines earlier in the session as investors brushed off disappointing Alphabet earnings and weighed the

prospect of future interest rate cuts from the U.S. Federal

**Asia:** Asian markets are trading higher Thursday, tracking gains on Wall Street as investors shrug off a week of trade turmoil and a slew of disappointing U.S. tech earnings.

India: Indian markets closed lower on Wednesday, dragged down by losses in consumer stocks amid weak earnings. Investor sentiment remained cautious ahead of the Reserve Bank of India's key bi-monthly policy announcement scheduled for February 7. Market is expected to open on a positive note and likely to witness range bound move during the day.

**Global economy**: The U.S. trade deficit widened sharply in December as imports surged to a record high against the backdrop of tariff threats, which might have prompted businesses to rush purchases of foreign-made goods like finished metals and computers. The United States experienced significant deficits with several trade partners, including China, Mexico and Canada, which have been targeted by President Donald Trump's administration for broad or additional tariffs.

Canada's services economy deteriorated for the second straight month in January as uncertainty generated by the threat of U.S. trade tariffs offset lower borrowing costs. The headline Business Activity Index rose to 49.0 from 48.2 in December but remained below the 50.0 no-change mark.

Italy's growth this year and next will be weaker than the government's official targets, the country's budget watchdog said on Wednesday, casting a shadow over prospects for the euro zone's third largest economy.

On Wednesday, Indonesia reported an economic growth of 5.03% for the year 2024, mirroring the growth rate from 2023 and meeting market predictions. Despite this consistency, the growth rate is the slowest the country has seen in the past three years. This performance has sparked expectations of potential additional stimulus measures to boost the economy.

**Commodities:** Oil prices ticked up in early Asian trading on Thursday, steadying from a sell-off the previous day after Saudi Arabia's state oil company sharply raised March oil prices.

Gold prices inched higher on Thursday to hover near an all-time high hit in the last session, as Sino-U.S. tariff war concerns boosted safe-haven demand, while investors awaited the payrolls data for clues about the health of the world's largest economy.

**Currency:** The U.S. dollar slumped to an eight-week trough to the yen and lingered near a one-month low versus sterling on Thursday, as investor nerves about an inflation-stoking global trade war abated.



FII Derivative Transactions (Rs. Cr)											
Contracts	Contracts Purchase			Sell		Open Inte	rest (OI)	OI (Previo	ous day)	Chai	nge
Contract Value		Contract	Value	Value	Contract	Value	Contract	Value	Contract	Value	
Index Future	17680	2939	13624	2306	633	233682	38814	230804	38242	2878	572
Index Option	6983606	1230379	7090255	1246070	(15691)	3279422	567485	2906929	502351	372493	65134
Stock Future	357067	21732	394289	24370	(2638)	5579634	351251	5581180	349724	(1546)	1527
Stock Option	1039556	65549	1053451	66520	(971)	985448	59932	901579	54363	83869	5569
Total	8397909	1320599	8551619	1339266	(18667)	10078186	1017482	9620492	944680	457694	72802

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
29-Jan-25	8230	10026	(1796)
30-Jan-25	15114	16868	(1754)
31-Jan-25	18093	18094	(1)
3-Feb-25	14406	18034	(3628)
4-Feb-25	18989	17960	1029
Month to date- Feb	33395	35993	(2599)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
31-Jan-25	14000	15189	(1189)
1-Feb-25	988	2315	(1327)
3-Feb-25	12506	16464	(3958)
4-Feb-25	18106	17297	809
5-Feb-25	14112	15795	(1683)
Month to date-Feb	45712	51871	(6159)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
31-Jan-25	13550	11317	2232
1-Feb-25	13364	12540	824
3-Feb-25	19319	16611	2708
4-Feb-25	15003	15433	(431)
5-Feb-25	12861	11864	996
Month to date-Feb	60547	56449	4098
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
29-Jan-25	2050	1544	506
30-Jan-25	1679	624	1054
31-Jan-25	12328	2730	9598
3-Feb-25	2945	1002	1943
4-Feb-25	3107	774	2333
Month to date- Feb	6052	1776	4276

Market Breadth	B5	SE	N:	SE
	No.	%	No.	%
Advance	2515	61%	1943	68%
Decline	1467	36%	867	30%
Unchanged	124	3%	59	2%

	Market Turnover	05-Feb	04-Feb	Var (%)
	BSE Cash	5319	5429	-2%
	NSE Cash	94512	104199	-9%
	NSE Futures	109132	153484	-29%
	NSE Options	15505577	13477074	15%
	Total (Rs.Cr)	15714540	13740185	14%

Volatility Index	14.08 14.02		4.02
Volatility Index	05-Feb	02	I-Feb

Index PE - TTM	05-Feb	Yr. High	Yr. Low
Sensex	22.3	25.7	21.5
Nifty	21.5	24.4	20.8

#### **Corporate News**

#### Azad Engineering wins order from Rolls- Royce PLC, London

To supply super critical complex machined parts for civil aircraft engine. Rolls- Royce PLC, London- United Kingdom inks deal with AZAD Engineering to produce CIVIL AIRCRAFT ENGINE components in AZAD, India to supply on a long term basis super critical complex machined parts for a period of life of the Engine Program. (BS)

#### Dabur India Limited faces ₹46 cr GST demand

Dabur India Limited has been ordered to pay a GST demand of ₹46.13 cr for the for the financial years 2017-18 to 2022-23, which includes penalty and interest. The company has already paid ₹19.57 cr under protest and plans to challenge the order, citing strong merits in their case. (BS)

## UltraTech Cement expands capacity with new 0.6 MTPA grinding unit in West Bengal

UltraTech Cement Limited has announced the commissioning of a new 0.6 million tonnes per annum (MTPA) grinding capacity at its existing unit in Sonar Bangla, West Bengal. This strategic addition is aimed at catering to the growing demand for composite cement in the Eastern region of India, while also boosting the company's blended cement ratio. (ET)

#### Economy

#### Services growth slows to 26-month low in January

India's services sector growth slowed to a 26-month low in January, with the HSBC India Services Business Activity Index falling to 56.5. New business intakes were at their lowest since November 2023, despite favorable demand conditions and investment in technology. Job creation surged, but higher costs pressured expenses. International sales improved, countering the downturn. (ET)

#### Govt extends export ban on de-oiled rice bran till Sep

The government has extended the ban on exports of de-oiled rice bran till September 30, 2025, to help control domestic prices and ensure availability for cattle feed. Additionally, DGFT has updated norms regarding wastage and standard input-output for the export of jewellery to align with duty-free metal imports. (ET)

#### International

#### Google scraps diversity-based hiring targets

Alphabet's Google is scrapping its goal to hire more employees from underrepresented groups and is reviewing some of its diversity, equity and inclusion (DEI) initiatives, joining a slew of U.S. businesses scaling back diversity initiatives. (Inv)



Top 5 Nifty Gainers	05-Feb	04-Feb	Var(%)
ONGC	262	254	3.0%
HINDALCO	601	584	2.9%
APOLLOHOSP	6945	6792	2.2%
BPCL	261	256	2.1%
ADANIPORTS	1144	1125	1.7%
Top 5 Nifty Losers	05-Feb	04-Feb	Var(%)
ASIANPAINT	2275	2354	-3.4%
TITAN	3491	3598	-3.0%
NESTLEIND	2249	2299	-2.2%
	2249 2391	2299 2438	-2.2% -1.9%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	78271	-0.4%	2.0%	0.4%	8.4%
MIDCAP	43374	0.7%	2.4%	-5.3%	10.2%
SMLCAP	50508	1.4%	3.0%	-7.0%	9.1%
AUTO	52792	-0.1%	4.2%	-0.3%	15.9%
BANKEX	57048	0.0%	1.9%	0.5%	10.6%
Capital Goods	62048	0.2%	0.5%	-6.7%	9.8%
FMCG	20493	-1.4%	1.6%	-0.9%	3.9%
Health Care	43076	1.2%	3.5%	-4.2%	24.2%
IT	42251	0.1%	1.4%	-2.8%	8.2%
METAL	28468	1.6%	1.0%	0.6%	1.5%
Oil & Gas	25420	1.9%	2.1%	-2.1%	-10.4%
Power	6364	0.8%	-0.4%	-6.0%	-1.7%
Realty	7286	-1.7%	4.2%	-8.1%	6.6%

NSE USD Futures	05-Feb	04-Feb	Var (%)
Feb Expiry (Rs./\$)	84.77	84.77	0.0%
Mar Expiry (Rs./\$)	84.86	84.86	0.0%
Total Turnover (Rs. Crore)	5692	2614	118%

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

# TVS Motors Monthly Volume Growth (YoY) (Source: Company data)



10 year G-Sec Yield	Current	Previous	Change	
US	4.42%	4.42%	0 bps	
Japan	1.28%	1.29%	(0) bps	
India	6.66%	6.67%	(1) bps	
UK	4.44%	4.52%	(9) 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)	-660	-1204	543.7

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	Volume	Previous	Volume	Variance	No. of Share	ADR Price	BSE	Variance
	(US\$)		Day Price		(%)	Per ADR	(Rs.)	Price	(%)
Infosys Tech	22.31	9911017	22.38	9778160	-0.31%	1	1951.32	1897.05	2.9%
Wipro	3.71	7786763	3.72	4855047	-0.27%	1	324.49	317.10	2.3%
Dr.Reddy's	13.97	1395038	13.84	1460430	0.94%	1	1221.87	1227.55	-0.5%
ICICI Bank	29.18	5081831	29.18	2601069	0.00%	2	1276.10	1267.70	0.7%
HDFC Bank	61.60	2195001	61.10	1865629	0.82%	3	1795.92	1737.80	3.3%

GDR's (US\$)						
	Prices	Prev. Close	Change	Var %		
L&T	38.70	39.30	(0.6)	-1.5%		
RIL	58.60	59.30	(0.7)	-1.2%		
SBI	87.50	89.10	(1.6)	-1.8%		

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	
China Economy Data GDP	Current 5.40%	Previous 4.60%	

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 Up	date
Name	Date	Purpose
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
Oil & Natural Gas Corporation Ltd.	07/02/25	Second Interim Dividend
Power Grid Corporation Of India Ltd.	07/02/25	Second Interim Dividend
Quess Corp Ltd.	07/02/25	Rs.4.00 per share(40%)Interim Dividend
Rama Phosphates Ltd.	07/02/25	Stock Split from Rs.10/- to Rs.5/-
Sangam Finserv Ltd.	07/02/25	Bonus issue
Shriram Pistons & Rings Ltd	07/02/25	Interim Dividend
Shyam Metalics And Energy Ltd.	07/02/25	Rs.2.25 per share(22.5%)Interim Dividend



Bulk Deal As On 05/02/25

		BSE			
-	Security Name	Client Name		Quantity	Price
539528	AAYUSH	ALIA COMMOSALES LLP	S	500000	51.62
539528	AAYUSH	MOONLIGHT MULTITRADE LLP	В	406160	51.96
543439	BRANDBUCKT	PRATIKSHA SANTOSH SHENKAR	S	186000	8.33
534796	CDG	ANISHA FINCAP CONSULTANTS LLP	В	42969	35
544201	DFPL	JINENDRA KUMAR JAIN	В	210000	47.21
544201	DFPL	NEXT ORBIT VENTURES FUND	S	204000	47.26
543594	DPL	KALPALABDHI SECURITIES PRIVATE LIMITED	S	408000	15.26
531502	ESARIND	MAHEVARSH FINCON PRIVATE LIMITED	В	330000	7.04
531502	ESARIND	RINA JINESH MATALIA	S	252650	7.04
540614	GGENG	MOCKTAIL TRADING PRIVATE LIMITED	S	9150250	1.34
542682	HARISH	MILLENNIUM STOCK BROKING PVT LTD	S	20000	79.15
541627	HITECHWIND	ARUN GUPTA	В	24648	8.87
541627	HITECHWIND	GLASTON MARIO MENEZES	В	36253	8.68
523062	JJFINCOR	YAKSHIT FINANCE LIMITED	В	30000	61.8
530421	KUWERIN	VIJAYA DARAK	S	86224	8.03
512415	MERCTRD	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	102954	24.65
543579	NATURO	MINOLLOW PRIVATE LIMITED	S	152000	5.6
504378	NYSSACORP	MONOTYPE INDIA LIMITED	S	200000	5.52
504378	NYSSACORP	SUPERLINE TRADING COMPANY PRIVATE LIMITED	В	187000	5.52
35657	OONE	SRINIVAS RAO MUDDANA NRO NON PIS	S	190057	8.77
535657	OONE	SUMANCHEPURI	В	55522	8.52
531512	ORIENTTR	YAKSHIT FINANCE LIMITED	В	85000	35.39
540703	PROCLB	AJIT TALAKCHAND DALAL (HUF)	В	30000	39.45
540703	PROCLB	SUDHANSHU KANDA	В	25700	38.08
540703	PROCLB	SURAKSHIT FINLEASE PRIVATE LIMITED	S	40000	38.95
512591	PULSRIN	SHAILESH DHAMELIYA	S	903955	22.86
512591	PULSRIN	SHAILESH DHAMELIYA	В	775145	22.7
36659	PVVINFRA	NEELAM SURAJ CHANDNA	В	300100	7.56
511116	QUADRANT	IDBI TRUSTEESHIP SERVICES LTD	S	3287537	0.5
530525	RRETAIL	BLACKBERRY SAREES PRIVATE LIMITED	В	1056189	10.3
530525	RRETAIL	MENTAX IMPEX PRIVATE LIMITED	В	960000	10.3
530525	RRETAIL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	В	940000	10.3
530525	RRETAIL	RAJMISH TRADERS LLP	S	20000	11.34
530525	RRETAIL	RAJMISH TRADERS LLP	В	1614896	10.26
530525	RRETAIL	SETU SECURITIES PVT. LTD.	В	1000000	10.26
538923	SOFCOM	SANGUINE MANAGEMENT SERVICES	В	50000	70.59
544327	TECHNICHEM	CHIRAG L GANDHI	S	96000	58.56
544327				96000	58.5
	TECHNICHEM	CHIRAG L GANDHI	В		
544327	TECHNICHEM	VIKASA INDIA EIF I FUND-INCUBE GLOBAL OPPORTUNITIES	S	96000	58.5
521005	TITANIN	CHAUSA TECHNOLOGIES PRIVATE LIMITED	S	238238	15.67
21005	TITANIN	DEVITRADERS LLP	S	403003	15.63
521005	TITANIN	DEVI TRADERS LLP	В	603001	15.65
521005	TITANIN	ISHAAN TRADEFIN LLP	S	6200	15.62
521005	TITANIN	ISHAAN TRADEFIN LLP	В	200000	15.62
521005	TITANIN	KTR CONSTRUCTIONS LLP	S	185571	15.67
521005	TITANIN	SUNKESULA INFRA LLP	S	535310	15.71
506122	VOLKAI	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	2435	259.6





NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
ATL	Allcargo Terminals Ltd	DIVYA JIGAR SANGHVI	BUY	1845741	33.42
ATL	Allcargo Terminals Ltd	RAAJDEEP ENTERPRISES	SELL	1845741	33.38
EASEMYTRIP	Easy Trip Planners Ltd	CORE4 MARCOM PRIVATE LIMITED	SELL	31821981	13.09
GSMFOILS	GSM Foils Limited	SANDEEP SINGH	BUY	78000	124
JINDRILL	Jindal Drilling And Indus	BHAGYA-LAXMI-FINLEASE-&-INVESTMENTS-(P)-LTD	SELL	150000	964.61
JAIPURKURT	Nandani Creation Limited	MIRACLE CARRIERS AND TRADING CO	BUY	100000	54.83
OBSCP	OBSC Perfection Limited	BRESCON OPPORTUNITIES FUND	SELL	122400	190
DIAMONDYD	Prataap Snacks Limited	BHARAT VALUE FUND	BUY	501781	1104.41
RELIGARE	Religare Enterprises Limi	GIRDHARILAL VISHINDAS LAKHI	SELL	1700024	245.48
REPRO	Repro India Limited	BELGRAVE INVESTMENT FUND	BUY	375000	490.03
REPRO	Repro India Limited	GP EMERGING MARKETS STRATEGIES LP GP	SELL	139260	490.03
REPRO	Repro India Limited	UNIVERSITY OF NOTRE DAME DU LAC ND	SELL	145649	490.03
REXPRO	Rex pro Enterprises Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	112000	81.8
ROSSELLIND	Rossell India Limited	BMG INVESTMENTS PVT LTD	BUY	500000	70.1
ROSSELLIND	Rossell India Limited	RISHAB MOHAN GUPTA	SELL	500000	70.1
SAJHOTELS	Saj Hotels Limited	GUNVANT CHIMANLAL GOPANI	SELL	88000	79.47
SAJHOTELS	Saj Hotels Limited	SANDEEP SINGH	BUY	100000	79.01
SATKARTAR	Sat Kartar Shopping Ltd	GENERATIONAL CAPITAL BREAKOUT FUND 1	BUY	142400	209
SATKARTAR	Sat Kartar Shopping Ltd	PRABHAT FINANCIAL SERVICES LIMITED	SELL	144000	209.02
STALLION	Stallion Ind Fluorochem L	SUNIL SHARMA	BUY	433460	105.24
TVVISION	TV Vision Limited	INDIAN OVERSEAS BANK	SELL	337149	5.28



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