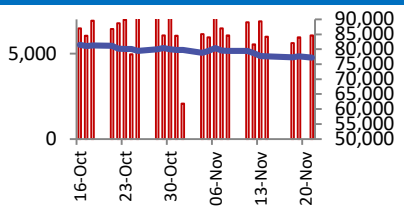
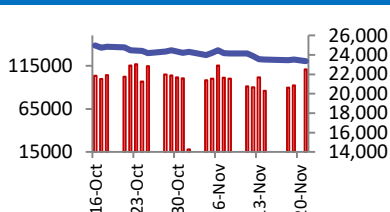


BSE		NSE																													
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World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	43870	43408	462	1.1%
Dow Futures	44005	43989	16	0.0%
Nasdaq	18972	18966	6	0.0%
FTSE	8149	8085	64	0.8%
Nikkei	38415	38026	389	1.0%
Hang Seng	19595	19601	(6)	0.0%
Gift Nifty	23432	23458	(26)	-0.1%
Straits Singapore	3748	3739	9	0.2%
South Korea	2507	2481	27	1.1%
Taiwan	22918	22556	362	1.6%
Shanghai	3347	3370	(24)	-0.7%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9009	9090	(81)	-0.9%
Alumin (\$/MT)	2632	2644	(13)	-0.5%
Zinc (\$/MT)	2990	2988	3	0.1%
Brent Crude (\$/bbl)	75	74	0	0.4%
Gold (\$/Ounce)	2686	2670	17	0.6%
Silver (\$/Ounce)	31	31	0	0.6%
Light Crude (\$/bbl)	70	70	0	0.6%
N G (\$/mmbtu)	3	3	0	4.4%
Sugar (\$/MT)	554	559	(5)	-1.0%
Rubber (Rs./kg)	186	183	3	1.4%
Baltic Dry Index	1576	1616	(40)	-2.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	84.50	84.42	0.10%
Rs./ Euro	88.87	89.06	-0.22%
Rs./Chinese Yuan	11.66	11.67	-0.10%
Yen / \$ rate	154.39	154.54	-0.10%
\$ US/Euro	1.05	1.05	-0.04%

Dollar Index	Current	Previous	Var(%)
Dollar Index	107.09	106.97	0.11%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	23270	50000
Support 2	23200	49740
Resistance	23440	50740

Securities in Ban For Trade	
ABFRL	GRANULES
GNFC	AARTIIND
HINDCOPPER	IGL
ADANIANT	NATIONALUM

Market Review

US: The three main indexes finished higher in a choppy session led by gains in utilities, financials, consumer staples and industrials. Communication services stocks were the biggest drag, driven by losses in Alphabet, which ended down about 6%.

Asia: Asian markets traded higher on Friday, following the overnight rally on Wall Street, and the release of economic data in the region.

India: On Thursday, the Indian stock market indices resumed their downward march and ended over half a percent lower each. **Market is expected to open on a positive note and likely to witness range bound move may be seen during the day.**

Global economy: Singapore's current account surplus increased to SGD 34.14 billion in the Q3 of 2024 from SGD 33.96 billion in the Q3 of 2023. The services account surplus widened to SGD 13.94 billion in the Q3 of 2024 from SGD 10.96 billion in the Q3 of 2023, mainly due to higher transport and freight services, while the goods account surplus declined slightly to SGD 52.53 billion from SGD 52.90 billion, amid a surge in imports. In the meantime, the primary income deficit widened to SGD 30.47 billion in Q3 from SGD 27.71 billion in Q3 of 2023, while the secondary income gap dropped to SGD 1.86 billion from SGD 2.19 billion. In 2023, the current account surplus widened to SGD 133.11 billion from SGD 123.67 billion in 2022.

South Korea's government is contemplating a supplementary budget early next year to address declining consumer spending and slow economic growth. The proposed budget for 2025 sets total government expenditure at 677.4 trillion won, reflecting a 3.2% increase from 2024. This increase is slightly more than this year's smallest boost since 2005 (2.8%) but falls short of the previously projected 4.2%. The finance ministry plans to submit this budget proposal to the National Assembly for approval soon.

Commodities: Oil prices rose in Asian trade on Friday and were headed for a positive week as increased concerns over Russia and Ukraine saw traders attach a greater risk premium to crude.

Gold prices held steady on Friday, heading for a weekly gain as geopolitical tensions fueled safe-haven demand. Investors awaited clearer signals on U.S. interest rates following mixed messages from Fed officials and positive U.S. jobless claims data.

Currency: The U.S. dollar stuck close to a 13-month high on Friday as investors assessed the outlook for the Federal Reserve's interest rate path and uncertainty in Europe kept the euro on the back foot, while bitcoin eyed the \$100,000 level.

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	75103	4803	84627	5401	(598)	400675	26219	390963	25696	9712	523
Index Option	54172125	3266010	55759966	3361312	(95302)	5329470	341223	6815358	428419	(1485888)	(87196)
Stock Future	444928	27868	501100	31478	(3610)	5015738	319241	5038282	323632	(22544)	(4391)
Stock Option	1215524	79887	1254653	82414	(2527)	1054262	66471	960855	61927	93407	4544
Total	55907680	3378568	57600346	3480605	(102037)	11800145	753154	13205458	839674	(1405313)	(86520)

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
12-Nov-24	18653	15809	2843
13-Nov-24	16344	17696	(1352)
14-Nov-24	13809	15302	(1493)
18-Nov-24	14410	16438	(2028)
19-Nov-24	16282	18200	(1918)
Month to date- Nov	153485	177001	(23516)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
13-Nov-24	15178	17681	(2503)
14-Nov-24	13003	14853	(1850)
18-Nov-24	14256	15660	(1403)
19-Nov-24	15255	18667	(3412)
21-Nov-24	16560	21880	(5321)
Month to date-Nov	154917	194586	(39669)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
13-Nov-24	14095	7950	6145
14-Nov-24	10200	7719	2482
18-Nov-24	11521	9191	2331
19-Nov-24	13658	10874	2784
21-Nov-24	14556	10356	4200
Month to date-Nov	148009	112172	35837
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
12-Nov-24	3394	3874	(481)
13-Nov-24	2924	7413	(4489)
14-Nov-24	4335	4985	(649)
18-Nov-24	2722	4602	(1881)
19-Nov-24	1701	2222	(520)
Month to date- Nov	31915	42439	(10524)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1171	29%	752	26%
Decline	2809	69%	2048	72%
Unchanged	85	2%	51	2%

Market Turnover	21-Nov	19-Nov	Var (%)
BSE Cash	6061	5951	2%
NSE Cash	110780	92273	20%
NSE Futures	153702	136251	13%
NSE Options	44240660	38083134	16%
Total (Rs.Cr)	44511203	38317608	16%

Volatility Index	21-Nov	19-Nov
Volatility Index	15.99	15.66

Index PE - TTM	21-Nov	Yr. High	Yr. Low
Sensex	22.0	26.0	21.8
Nifty	21.5	28.8	20.8

Corporate News

SJVN signed a MoU with Rajasthan government's energy department

SJVN signed Memorandum of Understanding (MoU) with the Energy Department of the Government of Rajasthan, focusing on the development of renewable energy projects in the state. As per the MoU, SJVN plans to develop 5 GW of pumped storage projects and 2 GW of floating solar projects. Both the parties have agreed to collaborate for development of renewable energy on long term basis. (MC)

JSW to set up wind turbine blade manufacturing unit in Karnataka

JSW Energy plans to establish a wind turbine blade manufacturing facility in Karnataka. The plant will cater to the company's internal needs. JSW Energy aims to reduce reliance on imports and ensure a steady supply of wind turbine generators. The company has secured a technology licensing agreement with China's Sany Renewable Energy. (ET)

Tata Power ties up with ADB for financing clean energy projects worth \$4.25 bn

The scope of the MoU includes evaluation of financing for several key ongoing projects such as the 966-MW solar-wind hybrid project, pump storage projects and other initiatives around energy transition, decarbonization, and battery storage. (Mint)

Economy

Staples, essentials show strong growth amid consumption slowdown, signalling potential recovery

Despite an economic slowdown, Indian consumers are prioritizing essential goods. Staples like edible oil and spices saw double-digit growth in the last quarter, indicating a potential demand recovery on the horizon. (MC)

Finance ministry likely to launch digital credit assessment model for MSMEs in December

The finance ministry will in December launch a credit assessment model for Micro, Small, and Medium Enterprises (MSMEs) to simplify loan access by leveraging digital footprints. The initiative, announced in the Budget 2024, promises to replace traditional credit assessment mechanisms with a data-driven approach and help smaller MSMEs, which are often ignored due to lack of formal documents, to get loans easily. (MC)

International

Boeing secures \$2.38 bn contract for 15 additional U.S. Air Force KC-46A tankers

Boeing has secured a \$2.38 bn contract from the U.S. Air Force to build 15 additional KC-46A Pegasus aerial refueling tankers under the Lot 11 procurement. Boeing now has 168 KC-46A tankers on contract globally. (Inv)

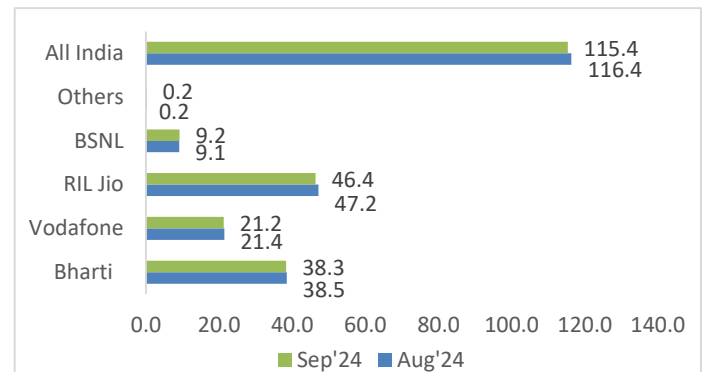
Top 5 Nifty Gainers	21-Nov	19-Nov	Var(%)
POWERGRID	326	315	3.4%
ULTRACEMCO	10955	10770	1.7%
DIVISLAB	5977	5901	1.3%
HINDALCO	648	640	1.3%
GRASIM	2535	2508	1.1%
Top 5 Nifty Losers	21-Nov	19-Nov	Var(%)
ADANIANT	2184	2822	-22.6%
ADANIPTS	1115	1290	-13.6%
SBILIFE	1478	1523	-3.0%
NTPC	356	367	-2.9%
SBIN	781	803	-2.8%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	77156	-0.5%	-1.9%	-3.8%	16.9%
MIDCAP	44468	-0.4%	-1.8%	-3.3%	32.7%
SMLCAP	52141	-0.7%	-2.7%	-2.6%	31.7%
AUTO	52304	-0.9%	-0.6%	-6.5%	35.3%
BANKEK	57383	-0.4%	-1.6%	-1.7%	17.0%
Capital Goods	65863	-0.7%	-2.8%	-4.2%	35.0%
FMCG	20336	-1.4%	-2.6%	-6.8%	6.8%
Health Care	42447	0.1%	-1.7%	-1.5%	41.9%
IT	41542	0.4%	-2.0%	0.4%	25.3%
METAL	29726	-0.2%	-1.6%	-6.2%	25.8%
Oil & Gas	25249	-1.4%	-5.8%	-11.3%	30.4%
Power	7216	-1.3%	-3.9%	-9.6%	52.8%
Realty	7631	1.1%	0.9%	-2.2%	38.9%

NSE USD Futures	21-Nov	19-Nov	Var (%)
Nov Expiry (Rs./\$)	84.21	84.21	0.0%
Dec Expiry (Rs./\$)	84.53	84.45	0.1%
Total Turnover (Rs. Crore)	2026	1614	26%

Sectors	TTM PE
Auto	29.98
Auto Ancillary	48.72
Banking	13.69
Engineering	45.13
Cement	79.46
Diamonds & Jewellery	54.26
Housing Finance	25.55
Infrastructure & Const	33.86
Metals-Aluminium	35.64
Metal – Steel	15.82
Oil Expl.	13.14
Pharma	9.39
Power – Gen. Supp.	42.19
Information Tech.	26.93
Sugar	22.59
Telecom Serv. Prov.	67.92
Tyres	27.51

Telecom Subscribers No's Sep'24 (Crore) (Source: Trai; NBRR)



10 year G-Sec Yield	Current	Previous	Change
US	4.41%	4.42%	(1) bps
Japan	1.10%	1.10%	(0) bps
India	6.86%	6.85%	2 bps
UK	4.44%	4.47%	(3) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	676	676	0.0%
Inflation - WPI	2.36%	1.84%	52 bps
Inflation - CPI	6.21%	5.49%	72 bps

India GDP	Q1FY25	Q4FY24	Var(%)
Growth	6.70%	7.76%	(106)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)	873	1261	(388.8)

IIP Growth %	Sep-24	Sep-23	Apr-Feb
IIP	3.1	6.4	4.4
Capital Goods	0.7	13.1	3.6
Mining	1.0	10.0	4.1
Manufacturing	-3.7	15.3	6.6
Electricity	-4.3	12.3	5.1

Bulk Deal As On 21/11/24

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539528	AAYUSH	MOONLIGHT MULTITRADE LLP	B	220160	134.5
539661	ACEMEN	GUTTİKONDA RAJASEKHAR	S	16930	73.09
539115	ALAN SCOTT	NIRMAL AGGARWAL	S	12403	155.55
539115	ALAN SCOTT	PHANI KISHORE TALLURI	B	10000	155.54
516064	ARROWGREEN	JIGISHA SHILPAN PATEL	S	125000	932
516064	ARROWGREEN	NIKHIL RAMESH JAISINGHANI	B	100000	931.84
516064	ARROWGREEN	RR FAMILY TRUST	B	200000	931.72
516064	ARROWGREEN	SHILPAN PRAVIN PATEL	S	165348	932
530187	ATHARVENT	PRAKASHCHAND MUKESHKUMAR	S	171000	2.27
539288	AVI	RAVINDRAKUMAR	S	25410	12.3
534691	COMCL	ARAVAMUDHAN GOVINDARAJAN	B	94872	37.46
512379	CRESSAN	AZMAT TRADERS LLP	S	2000000	7.49
512379	CRESSAN	KAUSHAL HITESHBHAI PARIKH	B	2302614	7.08
539884	DARSHANORNA	AMITA HIMANSHU MEHTA	B	300000	4.89
539884	DARSHANORNA	BHATIA NIKHIL MURLIDHAR	S	528839	4.94
539884	DARSHANORNA	BHATIA NIKHIL MURLIDHAR	B	528839	5
539884	DARSHANORNA	MAHENDRABHAI RAMNIKAL SHAH	S	1500000	5
539884	DARSHANORNA	VANITA JAGDISH SHAH	B	850000	5
530171	DAULAT	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	28994	47.69
543516	DHYAANITR	SOMANI VENTURES AND INNOVATIONS LIMITED	B	182000	11.7
543521	FONE4	HEMA LAKSHMAN	B	120000	7.16
539216	GARMNTMNTR	CREDENT GLOBAL FINANCE LIMITED	B	1700000	2.36
539216	GARMNTMNTR	CREDENT INVESTMENT PRIVATE LIMITED	S	1700000	2.36
539449	IGCIL	JHUMA DAS	B	15400	22.94
539175	INDRAIND	AKARAM SIKANDAR MALEK	S	159101	14.73
539175	INDRAIND	BHUMIKABEN PATEL	S	520000	14.73
539175	INDRAIND	GREEN PEAKS ENTERPRISES LLP	B	84000	14.73
539175	INDRAIND	JANAKI RAMAN SUNDAR VIGNESH	S	75000	14.71
539175	INDRAIND	RAJSHRI CHOUDHARY	B	100000	14.73
539175	INDRAIND	SALIMBHAI UMARBHAI MALEK	S	257122	14.73
539175	INDRAIND	SHAILESH DHAMELIYA	B	114890	14.71
523712	JMGCORP	GANESH DASS GUPTA	S	907800	8.48
523712	JMGCORP	KANTA DEVI SAMDARIA	B	230000	8.48
523712	JMGCORP	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	350000	8.48
523712	JMGCORP	SKYWAYS FINANCIAL SERVICES LLP	S	258000	8.48
523712	JMGCORP	SUMARG EDUCATION RESOURCES PRIVATE LIMITED	S	300000	8.48
523712	JMGCORP	VIVEK KANDA	B	225000	8.48
544188	MAGENTA	NILESH BABULAL KABRA	S	48000	27.5
544287	MANGALCOMP	DEVENDRA DAGA HUF	B	99000	45
544287	MANGALCOMP	JAI KISHAN DEVENDRA DAGA	B	99000	45
544287	MANGALCOMP	KIRTI J DOSHI (HUF)	B	210000	45
544287	MANGALCOMP	YOGENDRA DAGA HUF .	B	99000	45
539519	MAYUKH	KRISHNA KUMAR GOYAL	S	708432	1.97
540519	MEERA	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	78495	80.9
532140	MOHITE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	167478	80.3
543579	NATURO	AARAV REALITY PRIVATE LIMITED	S	316000	11.4
543579	NATURO	BANSRAJ GOND	B	400000	11.4
543579	NATURO	MAHEVARSH FINCON PRIVATE LIMITED	B	232000	11.4

543579	NATURO	SHAH TEJASKUMAR ATULKUMAR	S	300000	11.4
544245	NHL	ROHAN VINAY PAI HUF	B	16000	79.26
532911	PARLEIND	ANKIT AGRAWAL	B	100000	16.21
532911	PARLEIND	F3 ADVISORS PRIVATE LIMITED	S	129360	16.17
532911	PARLEIND	F3 ADVISORS PRIVATE LIMITED	B	50000	16.21
532911	PARLEIND	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	91522	16.21
532911	PARLEIND	SMEET RITESH POLADIA	B	100000	16.11
530095	PRADHIN	LAXMANBHAI RAVJIBHAI GAJERA	B	18613	28.54
530095	PRADHIN	SACHIN BATRA	B	26818	28.42
540703	PROCLB	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	62652	36.75
512591	PULSRIN	MITTAL LIFE STYLE LIMITED	B	400000	16.48
540159	PURPLE	GOPI CHAND BANDLAMUDI	S	60656	3.55
539673	RCL	SOORYA GAYATHRI NEELIYATH	B	80000	4
511712	RELICTEC	SMITHA POLINENI	B	20000	17.82
526081	SCAGRO	ASHNARAWAT	B	56500	14.15
526081	SCAGRO	DEEPTI BEWARANKAR	B	49469	14.15
526081	SCAGRO	NEERAJ KUMAR	B	58374	14.15
526081	SCAGRO	SHEELA CHANDAK	S	177000	14.15
543515	SEML	SHEETAL AGARWAL	S	228000	106.2
539593	SHIVA	GOPI CHAND BANDLAMUDI	S	50000	4.15
543924	SONALIS	MOHAMMED IBRAHIM MUSTAFA	S	10000	79.2
540914	SRUSTEELS	ALOK KUMAR	B	500000	7.21
540914	SRUSTEELS	BHAKTI YASH NATHWANI	B	404127	7.25
540914	SRUSTEELS	KETAN RAJENDRA ACHARYA	S	1347153	7.21
540914	SRUSTEELS	SACHIN GOVINDLAL MODI	S	800000	7.21
540914	SRUSTEELS	SRESTHA FINVEST LIMITED	B	1325000	7.21
530419	SUMEDHA	MURARI LAL SETHI	S	63004	74.87
530419	SUMEDHA	RAJESH KUMAR SODHANI HUF	B	134036	78.17
542025	SUNRETAIL	AMANGOYAL	B	1536000	0.75
542765	TRANSPACT	VISHAL MAHESH WAGHELA	S	2500	213.65
526113	UNRYLMA	C C USMAN	S	49743	18.24
526113	UNRYLMA	RINTU REBECCA JACOB	B	49743	18.24
530057	VIVANZA	AMMISHI MEEHIIR DESAI	B	300000	4.02
530057	VIVANZA	AYUSHI PIYUSHKUMAR PATEL	B	57055	4.01
530057	VIVANZA	AYUSHI PIYUSHKUMAR PATEL	S	339767	4.04
530057	VIVANZA	SANKET RAMESH FUKE	B	348000	4.03

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
FONEBOX	Fonebox Retail Limited	KN FAMILY TRUST	BUY	72000	145.28
GSTL	Globesecure Techno Ltd	KAILASHBEN ASHOKKUMAR PATEL	SELL	90000	37.8
JALAN	Jalan Transolu. India Ltd	KUNAL CHATTERJEE	BUY	78000	5.02
KANDARP	Kandarp Dg Smart Bpo Ltd	AIRAN LIMITED	BUY	60000	36.83
LEMERITE	Le Merite Exports Limited	SWETA ABHISHEK LATH	SELL	136000	226.21
MITTAL	Mittal Life Style Limited	L7 HITECH PRIVATE LIMITED	BUY	4500000	2
NEELAM	Neelam Linens & Gar (I) L	MANOJ AGARWAL	BUY	192000	41.9
SHANTHALA	Shanthala FMCG Products	SAPNA SHARMA	SELL	38400	39.09

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