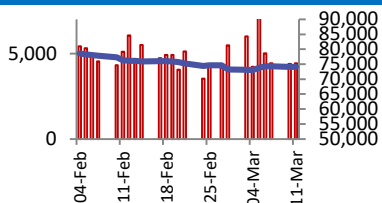
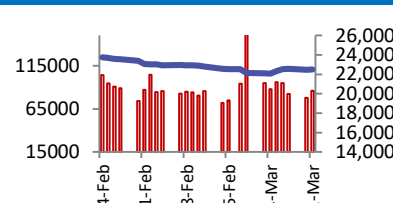


**BSE**



Open	73744
High	74195
Low	73664
Close	74102
Change	-13
Volume (Lacs)	5350
Turnover (Rs.inCr)	4423

**NSE**



Open	22346
High	22522
Low	22315
Close	22498
Change	38
Volume(Lacs)	29555
Turnover(Rs.in Cr)	86057

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	41433	41912	(478)	-1.1%
Dow Futures	41556	41475	81	0.2%
Nasdaq	17436	17468	(32)	-0.2%
FTSE	8496	8600	(104)	-1.2%
Nikkei	36899	36793	106	0.3%
Hang Seng	23797	23782	15	0.1%
Gift Nifty	22559	22525	35	0.2%
Straits Singapore	3835	3826	10	0.3%
South Korea	2579	2538	41	1.6%
Taiwan	22365	22071	294	1.3%
Shanghai	3376	3380	(4)	-0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9663	9529	134	1.4%
Alumin (\$/MT)	2703	2694	9	0.3%
Zinc (\$/MT)	2913	2857	56	2.0%
Brent Crude (\$/bbl)	70	70	0	0.6%
Gold (\$/Ounce)	2918	2916	2	0.1%
Silver (\$/Ounce)	33	33	(0)	-0.5%
Light Crude (\$/bbl)	67	66	0	0.7%
N G (\$/mmbtu)	4	4	(0)	-2.5%
Sugar (\$/MT)	525	531	(6)	-1.2%
Rubber (Rs./kg)	195	194	1	0.3%
Baltic Dry Index	1436	1424	12	0.8%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	87.22	87.34	-0.13%
Rs./ Euro	95.15	94.76	0.41%
Rs./Chinese Yuan	12.05	12.03	0.19%
Yen /\$ rate	148.05	147.78	0.18%
\$ US/Euro	1.09	1.09	-0.14%

Dollar Index	Current	Previous	Var(%)
Dollar Index	103.53	103.42	0.11%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22440	47740
Support 2	22370	47570
Resistance	22570	48270

Securities in Ban For Trade	
MANAPPURAM	HINDCOPPER
BSE	INDUSINDBK
SAIL	

**Market Review**

**US:** U.S. stocks fell on Tuesday, adding to the biggest selloff in months, as investors worried about the impact of the latest tariff threats on the global economy.

**Asia:** Stocks in the Asia Pacific region were mixed and traded in a tight range on Wednesday, after US President Donald Trump downplayed fears of a recession, helping US stocks post a late-day recovery amid a volatile session.

**India:** India's benchmark equity indices pared early losses to end Tuesday's session mixed as ICICI Bank Ltd. and Bharti Airtel Ltd. led the recovery. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

**Global economy:** The U.S. Department of Education said it would lay off nearly half its staff, a possible precursor to closing altogether, as govt agencies scrambled to meet Trump's deadline to submit plans for a second round of mass layoffs. The terminations are part of the department's final mission, it said in a press release, alluding to Trump's vow to eliminate the department, which oversees \$1.6 tn in college loans, enforces civil rights laws in schools and provides federal funding for needy districts.

Bank of Japan Governor Kazuo Ueda refrained from issuing a fresh warning against recent rises in bond yields, saying they were a natural reflection of market expectations of future interest rate hikes by the central bank. Long-term int rates move on various factors. But the biggest determinant is the market's forecast on the outlook for our short-term policy rate. Ueda said he saw no big divergence between the BOJ's view and that of markets, when asked about the recent steady rise in bond yields.

**Commodities:** Oil prices edged up early on Wednesday, helped by a weaker dollar, but mounting fears of a U.S. economic slowdown and the impact of tariffs on global economic growth capped gains.

Gold eased on Wednesday on a possible ceasefire deal in Ukraine, while investors braced for a key U.S. inflation data later in the day to gauge the Federal Reserve's interest rate path amid trade tensions and economic slowdown fears.

**Currency:** The dollar languished near a five-month low versus major peers on Wednesday, as worries about the U.S. economy continued to simmer under President Donald Trump's unpredictable trade policies.

**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	18686	2955	18178	2874	81	282611	44160	281773	43991	838	169
Index Option	5502656	914774	5373284	894545	20229	3092928	503876	2738391	444325	354537	59551
Stock Future	349002	19290	352007	18669	621	5668786	329649	5627953	327817	40833	1832
Stock Option	847285	49373	861540	49812	(439)	1198409	66352	1110544	62188	87865	4164
<b>Total</b>	<b>6717629</b>	<b>986392</b>	<b>6605009</b>	<b>965900</b>	<b>20492</b>	<b>10242734</b>	<b>944037</b>	<b>9758661</b>	<b>878321</b>	<b>484073</b>	<b>65716</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
4-Mar-25	12088	15624	(3536)
5-Mar-25	15423	17313	(1889)
6-Mar-25	13118	15757	(2639)
7-Mar-25	9790	13005	(3215)
10-Mar-25	12337	12835	(498)
<b>Month to date- Mar</b>	<b>72819</b>	<b>89259</b>	<b>(16440)</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
5-Mar-25	12046	14941	(2895)
6-Mar-25	9711	12089	(2377)
7-Mar-25	8635	10671	(2035)
10-Mar-25	9925	10410	(485)
11-Mar-25	8214	11038	(2824)
<b>Month to date-Mar</b>	<b>70401</b>	<b>89212</b>	<b>(18811)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
5-Mar-25	15068	11698	3371
6-Mar-25	13276	11658	1618
7-Mar-25	10453	8133	2320
10-Mar-25	9591	9328	264
11-Mar-25	10896	8894	2002
<b>Month to date-Mar</b>	<b>90171</b>	<b>66955</b>	<b>23216</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
4-Mar-25	2596	2015	580
5-Mar-25	2681	1262	1419
6-Mar-25	2599	2449	150
7-Mar-25	3060	1644	1416
10-Mar-25	3303	3544	(240)
<b>Month to date- Mar</b>	<b>18905</b>	<b>11782</b>	<b>7123</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1354	33%	922	32%
Decline	2629	64%	1929	66%
Unchanged	109	3%	50	2%

Market Turnover	11-Mar	10-Mar	Var (%)
BSE Cash	4423	4386	1%
NSE Cash	86057	77908	10%
NSE Futures	105638	95432	11%
NSE Options	12635904	13037467	-3%
<b>Total (Rs.Cr)</b>	<b>12832022</b>	<b>13215193</b>	<b>-3%</b>

Volatility Index	11-Mar	10-Mar
Volatility Index	14.07	13.99

Index PE - TTM	11-Mar	Yr. High	Yr. Low
Sensex	20.6	25.7	20.3
Nifty	20.0	24.4	19.6

**Corporate News**

**Bharti Airtel Partners with SpaceX to Launch Starlink Internet Services in India**

Bharti Airtel Ltd. has signed an agreement with Elon Musk's SpaceX to bring Starlink's high-speed satellite-based internet services to India. This marks Starlink's first agreement in India, though it remains subject to regulatory approvals for SpaceX to offer its services in the country. (NDTV)

**PB Fintech to invest Rs 696 cr in arm PB Healthcare Services**

PB Fintech Ltd., the parent entity of insurance brokerage firm Policybazar, it has proposes to infuse Rs 696 cr in its subsidiary PB Healthcare Services Private Limited in the next financial year to grow its business. The decision was taken by the Board of Directors of PB Fintech Ltd. in a meeting held on Tuesday. (MC)

**Navratna PSU RVNL emerges as lowest bidder for ₹554.64 cr NHAI project**

RVNL, a Navratna PSU under the Ministry of Railways, has secured a key infrastructure project, emerging as the lowest bidder (L1) for a ₹554.64 cr contract awarded by the National Highways Authority of India (NHAI). The project involves the construction of a six-lane access-controlled connectivity road linking Sabbavaram bypass (Anakapalli-Anandapuram corridor) to Sheelanagar junction of NH-516C in Andhra Pradesh. (CNBC)

**Economy**

**Grant of Rs 8,000 cr to develop 8 greenfield cities unutilised, may lapse**

The Ministry of Housing and Urban Affairs is tasked with developing eight new greenfield cities within a year, using a grant of ₹8,000 cr provided by the Fifteenth Finance Commission. The final list includes 28 proposals from 23 states, including North East states, for potential city incubation. (ET)

**Growth in net sales of FDI cos moderated to 9.3 pc in FY24: RBI**

The RBI reported a moderation in net sales growth of select FDI companies to 9.3% in 2023-24 from 20.3% the previous year, attributed to the normalization of post-pandemic demand. Despite lower sales growth, cost rationalization led to a 20.4% increase in operating profits. (ET)

**International**

**Rio Tinto to raise up to \$9 bn via bond sale to fund Arcadium buyout- Bloomberg**

Rio Tinto Ltd is issuing \$9 bn in U.S. investment-grade bonds to finance its recent acquisition of Arcadium Lithium PLC. The company is marketing the debt in eight parts, with the longest 40-year note expected to yield 1.33% points over Treasuries. Initial pricing discussions suggested a premium of around 1.625% points (Inv)

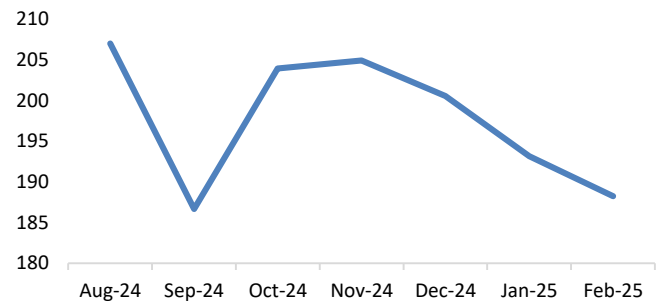
Top 5 Nifty Gainers	11-Mar	10-Mar	Var(%)
TRENT	4995	4800	4.1%
BPCL	265	257	3.0%
SUNPHARMA	1655	1612	2.7%
ICICIBANK	1245	1215	2.5%
SHRIRAMFIN	638	626	2.0%
Top 5 Nifty Losers	11-Mar	10-Mar	Var(%)
INDUSINDBK	656	901	-27.2%
INFY	1662	1701	-2.3%
M&M	2646	2703	-2.1%
BAJAJFINSV	1805	1840	-1.9%
POWERGRID	267	271	-1.5%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	74102	0.0%	1.5%	-2.7%	0.6%
MIDCAP	39590	0.7%	2.2%	-2.9%	0.9%
SMLCAP	44330	-0.7%	2.3%	-6.0%	3.5%
AUTO	46481	-0.1%	2.2%	-7.4%	-3.1%
BANKEK	55034	-0.4%	0.1%	-2.0%	2.5%
Capital Goods	57969	0.5%	1.9%	-1.6%	-0.7%
FMCG	18828	-0.2%	2.8%	-3.2%	-2.0%
Health Care	39326	0.3%	1.9%	-3.7%	13.9%
IT	36678	-0.9%	0.1%	-10.5%	-2.7%
METAL	30121	0.6%	6.3%	8.7%	7.7%
Oil & Gas	23683	1.6%	4.3%	-0.6%	-15.8%
Power	6134	0.1%	4.2%	2.7%	-7.9%
Realty	6453	3.9%	3.1%	-1.8%	-6.5%

NSE USD Futures	11-Mar	10-Mar	Var (%)
Mar Expiry (Rs./\$)	85.50	85.50	0.0%
Apr Expiry (Rs./\$)	86.14	86.14	0.0%
Total Turnover (Rs. Crore)	2338	2534	-8%

Sectors	TTM PE
Auto	28.23
Auto Ancillary	38.28
Banking	12.63
Engineering	48.34
Cement	68.05
Diamonds & Jewellery	43.94
Housing Finance	24.08
Infrastructure & Const	29.52
Metals-Aluminium	24.9
Metal – Steel	17.08
Oil Expl.	9.1
Pharma	8.82
Power – Gen. Supp.	37.37
Information Tech.	25.98
Sugar	16.32
Telecom Serv. Prov.	42.47
Tyres	26.66

Coking coal price- Australia (USD) (Source: BigMint)



10 year G-Sec Yield	Current	Previous	Change
US	4.27%	4.28%	(1) bps
Japan	1.54%	1.52%	2 bps
India	6.70%	6.70%	(1) bps
UK	4.67%	4.64%	3 bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	639	639	0.0%
Inflation - WPI	2.31%	2.37%	(6) bps
Inflation - CPI	4.31%	5.22%	(91) bps

India GDP	Q2FY25	Q1FY25	Var(%)
Growth	6.15%	5.58%	57 bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.25%	6.50%	(25) bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.00%	4.00%	0 bps
O/S Banking System Liquidity (Rs bn)	-1143	-1079	(63.4)

IIP Growth %	Dec-24	Dec-23	Apr-Feb
IIP	3.2	4.4	4.2
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	18.97	17695135	19.44	14185212	-2.42%	1	1654.61	1661.60	-0.4%
Wipro	3.14	6342628	3.18	4643458	-1.26%	1	273.88	277.75	-1.4%
Dr.Reddy's	12.71	1408621	12.70	934192	0.08%	1	1108.60	1116.65	-0.7%
ICICI Bank	28.52	5317228	28.09	11040605	1.53%	2	1243.79	1245.40	-0.1%
HDFC Bank	59.82	3789221	58.80	2362795	1.73%	3	1739.22	1685.50	3.2%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	36.40	36.20	0.2	0.6%
RIL	56.60	56.40	0.2	0.4%
SBI	83.00	82.80	0.2	0.2%

US Economy Data	Current	Previous
Inflation (%) (YoY)	3.00%	2.90%
Unemployment (%)	4.00%	4.10%

Interest Rate (%)	Current	Previous
Fed Rate	4.50%	4.50%

US GDP	Q4CY24	Q3CY24
Growth (QoQ Annualized)	2.30%	3.10%

China Economy Data	Current	Previous
GDP	5.40%	4.60%
Inflation – CPI (%)	-0.70%	0.50%

Economic Calendar

Economic Calendar	Date
Indian GDP Data	30 May
Indian Inflation Data CPI	To be announced
Indian Inflation Data WPI	17 Mar
Indian Monetary Policy	09 Apr
India's Industrial Production (IIP)	To be announced
US Inflation Data	To be announced
US GDP	27 Mar
US Unemployment Data	04 Apr
US Fed Rate	19 Mar
China GDP	16 Apr
China Inflation Data	10 Apr

Event Update

Name	Date	Purpose
GR Infraprojects Ltd.	13/03/25	Interim Dividend
Housing & Urban Development Corporation Ltd.	14/03/25	Interim Dividend
Mehai Technology Ltd.	14/03/25	Stock Split from Rs.10/- to Re.1/-
Shalimar Agencies Ltd.	14/03/25	Stock Split from Rs.10/- to Re.1/-
Shangar Decor Ltd.	14/03/25	Stock Split from Rs.5/- to Re.1/-



**Bulk Deal As On 11/03/25**

**BSE**

Security Code	Security Name	Client Name	Deal	Quantity	Price
538351	AFEL	MATHOLIYA CHETAN RUGNATHBHAI	B	185055	6.99
544353	AMWILL	KRISHNA AWTAR JAGANNATH KABRA HUF	B	104400	75.1
544353	AMWILL	RISHIKIRAN LOGISTICS PVT.LTD	S	106800	75.04
524516	BACPHAR	PASHUPATI CAPITAL SERVICE PVT LTD	B	62000	35.18
524516	BACPHAR	VISHAL MAHESH WAGHELA	S	35220	35.18
543516	DHYAANITR	ANJALIBEN MANOJKUMAR ARORA	B	92400	12.5
541299	DLCL	MADAN LAL GARG	B	32000	18.35
541299	DLCL	SOHAM FINCARE INDIA LLP	S	44000	18.65
541299	DLCL	SOHAM FINCARE INDIA LLP	B	44000	18.33
542906	EASUN	BHIM PRASAD	S	34524	46.05
530615	GARGFUR	ASHISH MULCHANDBHAI AMIN	S	25000	197
530615	GARGFUR	PREMIER LOOMS MANUFACTURE RS PVT LTD .	B	25000	197
539692	IFINSER	VICKY RAJESH JHAVERI	S	64616	26.94
540134	IISL	DEEP PATEL	B	62086	7.64
540134	IISL	VIPUL HARIDAS THAKKAR	S	50000	7.65
544221	KIZI	MATA LAXMI NURSING HOME AND INVESTIGATION CENTRE PRIVATE LIMITED	S	42000	16.9
544221	KIZI	SAMEER PAHLAJANI HUF	B	42000	16.9
526251	MIDEASTP	KAVIT GHANSHYAMBHAI JASOLIYA	B	45000	14.9
526251	MIDEASTP	MIDEAST HEALTHCARE PRIVATE LIMITED	S	59000	14.25
543305	NAVODAYENT	VINUTHA DAMODAR POOJARY	S	72000	4.77
543305	NAVODAYENT	VINUTHA DAMODAR POOJARY	B	60000	5.05
543400	OMNIPOTENT	KRISHNA MURARI TEKRIWAL	B	110000	7.2
543400	OMNIPOTENT	SUMANTEKRIWAL	S	110000	7.2
541444	PALMJEWELS	ASHU KUMAR AGGARWAL	S	144112	37.79
524808	PHYTO	SRIRAMI REDDY KASU	S	22135	29.9
511557	PROFINC	OMPRAKASH AGARWAL (HUF)	S	1513538	4.5
511557	PROFINC	RAJNEESH OMPRAKASH AGRAWAL	S	1653000	4.5
511557	PROFINC	RAMESH SAWALRAM SARAOGI	B	3300000	4.5
511116	QUADRANT	IDBI TRUSTEESHIP SERVICES LTD	S	5000000	0.37
540175	REGENCY	DELTHRO VEGA CAPITAL PRIVATE LIMITED	S	267697	29.18
540175	REGENCY	KAVANVIVEKSEJPAL	B	290745	29.18
511626	RRFIN	RAJAT PRASAD	S	165670	15
530617	SAMPRE	ANILKUMAR	S	107765	29.75
530617	SAMPRE	NOVARATHANMALPRAVEENKUMAR	B	110000	29.76
540914	SRUSTEELS	SACHIN GOVINDLAL MODI	S	966803	7.29
540914	SRUSTEELS	SRESTHA FINVEST LIMITED	S	1279816	7.45
540914	SRUSTEELS	SRESTHA FINVEST LIMITED	B	893001	7.32
540914	SRUSTEELS	SUMEET SINGHVI (HUF)	B	925000	7.51
539117	SUJALA	HARISH JAYRAM KATKE	S	29563	72.23
543745	SVS	CHAVDA DEVYANIBEN ANILKUMAR	S	114000	10.26
543745	SVS	CONSOLIDATED SPECIALITY SERVICES PRIVATE LIMITED	S	204000	10.23
543745	SVS	PASHUPATI CAPITAL SERVICE PVT LTD	B	270000	10.23
543745	SVS	VIPUL PRATAP SHAH	S	138000	10.91
543745	SVS	VISHAL MAHESH WAGHELA	B	546000	10.86
543745	SVS	YOGESH PRASANLAL DAGLI	S	156000	10.23
531499	SYBLY	GRID TRADING PRIVATE LIMITED	S	100000	6.02
531499	SYBLY	PACE STOCK BROKING SERVICES PVT LTD	B	83056	6.02
539798	UMIYA	SAURABH RAMESHCHANDRA PATEL	S	58000	29.95
531997	VUENOW	ABHIJIT RANASINGH RAGHUWANSHI	B	176900	112.6
538970	WARDINMOBI	SMITA HITENDRA SHAH	S	1051309	30.38
538970	WARDINMOBI	SMITA HITENDRA SHAH	B	1321309	30.53

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ANZEN	Anzen Ind Ene Yld Plu Tru	MABELLA INVESTMENT ADVISER LLP	BUY	1900000	105.32
ANZEN	Anzen Ind Ene Yld Plu Tru	TRUST INVESTMENT ADVISORS PRIVATE LIMITED	SELL	1900000	105.32
AVG	AVG Logistics Limited	MARS FINANCES	BUY	150000	221
AVG	AVG Logistics Limited	MATRIX INCREMENTYM	SELL	150000	221
BALAJIPHOS	Balaji Phosphates Limited	CHIRAG HEMANTKUMAR PATEL	BUY	194000	76.72
BALAJIPHOS	Balaji Phosphates Limited	GRETEX SHARE BROKING LIMITED	BUY	200000	76.89
CAREERP	Career Point Limited	MAGANTI SAKET	SELL	245000	340.27
GSLSU	Global Surfaces Limited	SHIKHAR AGGARWAL	BUY	250000	107.72
GTECJAINX	G-TEC JAINX EDUCATION	ANILKUMAR	SELL	135000	31
GTECJAINX	G-TEC JAINX EDUCATION	NOVARATHANMAL PRAVEENKUMAR	BUY	135000	31
INFY	Infosys Limited	GAURAV MANCHANDA	SELL	2984057	1657
INFY	Infosys Limited	SHRUTI SHIBULAL	BUY	2984057	1657
KHAITANLTD	Khaitan (India) Ltd.	PRIYADARSHAN PRABHAKAR SIRAS	BUY	24000	79
LOKESHMACH	LOKESH MACHINES LIMITI	NIRMALA NAGDA	SELL	97338	153.34
LOKESHMACH	LOKESH MACHINES LIMITI	PANNU BHANSALI	BUY	158050	153.95
ONDOOR	On Door Concepts Limited	ANANT WEALTH CONSULTANTS PRIVATE LIMITED	SELL	90000	138.05
RICHA	Richa Info Systems Ltd	CRAFT EMERGING MARKET FUND PCC- ELITE CAPITAL FUND	BUY	48000	52
RICHA	Richa Info Systems Ltd	V JOSHI IMPEX PRIVATE LIMITED	SELL	48000	52
SOMATEX	Soma Textiles & Ind. Ltd.	SHYAM JATIA FAMILY TRUST	BUY	170000	39.21
SPCENET	Spacenet Enters Ind Ltd	APR PROPERTIES PRIVATE LIMITED	SELL	3051650	7.81
TRANSTEEL	Transteeel Seating Tech L	CHAUBARA EATS PRIVATE LIMITED	BUY	176000	101.48
VDEAL	Vdeal System Limited	DARSHAN GULAB CHANDAK	SELL	28800	117
VISAMAN	Visaman Global Sales Ltd	SHRIPAL V VORA HUF	SELL	138000	37.93

**Disclosure:**

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