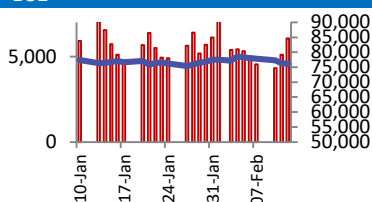
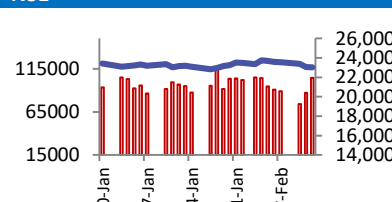


BSE



Open	76188
High	76460
Low	75388
Close	76171
Change	-123
Volume (Lacs)	6563
Turnover (Rs.inCr)	6067

NSE



Open	23051
High	23145
Low	22798
Close	23045
Change	-27
Volume(Lacs)	38266
Turnover(Rs.in Cr)	104610

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	44369	44594	(225)	-0.5%
Dow Futures	44523	44462	61	0.1%
Nasdaq	19650	19644	6	0.0%
FTSE	8807	8777	30	0.3%
Nikkei	39471	38964	507	1.3%
Hang Seng	22031	21858	173	0.8%
Gift Nifty	23135	23073	62	0.3%
Straits Singapore	3866	3875	(8)	-0.2%
South Korea	2573	2548	24	0.9%
Taiwan	23306	23290	16	0.1%
Shanghai	3351	3346	4	0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9455	9358	97	1.0%
Alumin (\$/MT)	2621	2644	(23)	-0.9%
Zinc (\$/MT)	2863	2821	42	1.5%
Brent Crude (\$/bbl)	75	75	(1)	-0.9%
Gold (\$/Ounce)	2908	2904	4	0.1%
Silver (\$/Ounce)	32	32	0	0.2%
Light Crude (\$/bbl)	71	71	(1)	-0.9%
N G (\$/mmbtu)	4	4	0	2.3%
Sugar (\$/MT)	518	512	6	1.2%
Rubber (Rs./kg)	190	191	(1)	-0.5%
Baltic Dry Index	776	801	(25)	-3.1%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	86.89	86.83	0.07%
Rs./ Euro	90.13	89.59	0.60%
Rs./Chinese Yuan	11.89	11.88	0.04%
Yen /\$ rate	154.20	154.42	-0.14%
\$ US/Euro	1.04	1.04	0.21%

Dollar Index	Current	Previous	Var(%)
Dollar Index	107.82	107.94	-0.11%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22970	49440
Support 2	22900	49200
Resistance	23100	50000

Securities in Ban For Trade
MANAPPURAM

Market Review

US: The US stocks tumbled and interest rates spiked Wednesday after consumer prices rose more than expected in January, raising concern that inflation may reignite.

Asia: Asian stocks rose on Thursday as an artificial intelligence-fueled rally in China and reports of deal making activity in Japan's technology sector helped offset headwinds from hot U.S. inflation data.

India: Benchmark Indian equity indices ended Wednesday's choppy session in the negative territory due to rising uncertainty in global and domestic markets coupled with falling rupee and fund outflows. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

Global economy: The U.S. Federal Budget Balance, a key indicator of the nation's fiscal health, has reported a deficit significantly larger than anticipated. The actual number stands at a deficit of \$129.0 bn, a figure that has triggered concern among economists and policymakers. This figure starkly contrasts with the forecasted deficit of \$88.1 bn, marking a deviation that is far from negligible.

Japan's annual wholesale inflation jumped to a seven-month high of 4.2% in January and accelerated for the fifth straight month, highlighting persistent price pressures and reinforcing market bets of another interest rate hike this year.

Commodities: Oil prices fell on Thursday on expectations a potential peace deal between Ukraine and Russia would mean the end of sanctions that have disrupted supply flows and U.S. President Donald Trump's intention to introduce reciprocal tariffs stoked inflation jitters.

Gold prices edged up on Thursday, as markets tracked developments in U.S. President Donald Trump's tariff plans, which could ignite a global trade war, while investors awaited U.S. inflation data due later in the day.

Currency: The U.S. dollar held near a one-week high against the Japanese yen on Thursday after a hotter-than-expected consumer prices reading, while the euro was shored up by news that Washington aims to begin talks with Russia to end the war in Ukraine.

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	31233	4993	33606	5418	(425)	267737	43061	257942	41566	9795	1495
Index Option	7865345	1350445	7893423	1355093	(4648)	2424005	403487	2396527	398590	27478	4897
Stock Future	448982	26434	396744	23723	2711	5786525	349892	5759709	348717	26816	1175
Stock Option	1575736	97800	1605235	99378	(1578)	1374721	79867	1280764	74551	93957	5316
Total	9921296	1479672	9929008	1483612	(3940)	9852988	876307	9694942	863424	158046	12883

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
5-Feb-25	14873	16021	(1148)
6-Feb-25	13765	17360	(3594)
7-Feb-25	12962	13434	(473)
10-Feb-25	10173	12471	(2297)
11-Feb-25	12429	16518	(4089)
Month to date- Feb	97597	111797	(14200)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
6-Feb-25	13470	17020	(3550)
7-Feb-25	12482	12953	(470)
10-Feb-25	9608	12072	(2464)
11-Feb-25	11496	15982	(4486)
12-Feb-25	12389	17358	(4969)
Month to date-Feb	105157	127255	(22099)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
6-Feb-25	11546	8824	2722
7-Feb-25	12186	11731	454
10-Feb-25	9802	8287	1516
11-Feb-25	13788	9786	4002
12-Feb-25	15357	9428	5929
Month to date-Feb	123226	104505	18721
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
5-Feb-25	2299	1175	1124
6-Feb-25	3225	880	2345
7-Feb-25	1110	362	748
10-Feb-25	250	2357	(2107)
11-Feb-25	3078	5619	(2541)
Month to date- Feb	16013	12169	3844

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1477	36%	1047	36%
Decline	2504	62%	1759	61%
Unchanged	85	2%	68	2%

Market Turnover	12-Feb	11-Feb	Var (%)
BSE Cash	6067	5100	19%
NSE Cash	104610	87197	20%
NSE Futures	145187	116865	24%
NSE Options	26509322	13717093	93%
Total (Rs.Cr)	26765186	13926256	92%

Volatility Index	12-Feb	11-Feb
Volatility Index	14.90	14.87

Index PE - TTM	12-Feb	Yr. High	Yr. Low
Sensex	21.2	25.7	21.2
Nifty	20.5	24.4	20.5

Corporate News

ONGC NTPC Green buys Ayana Renewable in Rs 19,500-cr deal
ONGPL signed an agreement to buy Ayana Renewable Power from National Investment and Infrastructure Fund, British International Investment and its subsidiaries, and Eversource Capital at an enterprise value of Rs 19,500 cr. This is the second-largest acquisition in the renewable energy space in the country, after Adani Green Energy's acquisition of SB Energy India for \$3.5 bn in October 2021. (FE)

RBI Lifts Ban On Kotak Mahindra Bank From Issuing New Credit Cards, Adding Customers Online

The RBI lifted ban on Kotak Mahindra Bank, allowing it to issue new credit cards and onboard new customers through online and mobile banking channels. The central bank had asked the private lender to to cease and desist the services in April 2024. (NDTV)

RIL establishes REC sustainable energy solutions in Singapore to support new energy initiatives

RIL has established a wholly owned subsidiary, REC Sustainable Energy Solutions, in Singapore to set up a global capability center aimed at consolidating R&D activities, recruiting global talent, and supporting new energy initiatives. RIL will invest \$100,000 for the initial subscription of 100,000 shares. (ET)

Economy

Industrial output growth slowed to 3.2% in December 2024

The drop in IIP is consistent with a slowdown in core sector output, which grew by 4% in Dec from 4.4% in the month before. The eight sectors that comprise the core sector account for 40.27% weightage in the IIP. (ET)

India seen struggling to fulfil sugar export quota

India has exported up to 500,000 MT of sugar this season, focusing on countries like Sri Lanka, Bangladesh, and Nepal. The pace is slowing due to mill closures and poor harvest conditions. Experts doubt the one million-ton quota will be met by Sep 2025. (ET)

International

Blue Origin prepares for significant job cuts

Blue Origin is preparing for significant job cuts to reduce costs and focus on increasing rocket launches after years of research and development, Bloomberg News reported on Wednesday, citing people familiar with the matter. (Inv)

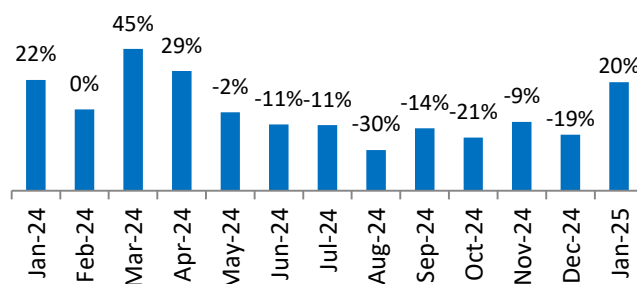
Top 5 Nifty Gainers	12-Feb	11-Feb	Var(%)
BAJAJFINSV	1789	1745	2.5%
SBILIFE	1452	1419	2.3%
HDFCLIFE	629	619	1.7%
TATASTEEL	132	130	1.7%
SHRIRAMFIN	547	539	1.6%
Top 5 Nifty Losers	12-Feb	11-Feb	Var(%)
M&M	2987	3086	-3.2%
EICHERMOT	4849	4972	-2.5%
BEL	259	265	-2.2%
ITC	410	418	-2.0%
HEROMOTOCO	4016	4086	-1.7%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	76171	-0.2%	-2.7%	-0.2%	6.5%
MIDCAP	40760	-0.5%	-6.0%	-3.9%	5.1%
SMLCAP	47136	-0.5%	-6.7%	-6.7%	6.4%
AUTO	50186	-0.8%	-4.9%	-0.6%	12.1%
BANKEKX	56181	0.3%	-1.5%	2.9%	8.6%
Capital Goods	58924	0.2%	-5.0%	-4.9%	8.3%
FMCG	19446	-0.3%	-5.1%	-4.9%	1.1%
Health Care	40820	-0.5%	-5.2%	-4.1%	15.6%
IT	40987	-0.7%	-3.0%	-5.8%	5.9%
METAL	27712	0.7%	-2.7%	3.4%	4.1%
Oil & Gas	23834	-0.6%	-6.2%	-5.1%	-13.0%
Power	5972	-0.4%	-6.2%	-2.9%	-5.4%
Realty	6571	-2.6%	-9.8%	-7.3%	-2.1%

NSE USD Futures	12-Feb	11-Feb	Var (%)
Feb Expiry (Rs./\$)	84.86	84.86	0.0%
Mar Expiry (Rs./\$)	84.83	84.83	0.0%
Total Turnover (Rs. Crore)	2708	9128	-70%

Sectors	TTM PE
Auto	31.92
Auto Ancillary	41.42
Banking	13.06
Engineering	46.85
Cement	76.43
Diamonds & Jewellery	49.82
Housing Finance	24.61
Infrastructure & Const	33.09
Metals-Aluminium	27.11
Metal – Steel	16.65
Oil Expl.	12.46
Pharma	9.49
Power – Gen. Supp.	40.95
Information Tech.	26.8
Sugar	22.71
Telecom Serv. Prov.	44.32
Tyres	28.16

Force Motors Monthly Volume Growth (YoY) (Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.60%	4.62%	(2) bps
Japan	1.37%	1.34%	2 bps
India	6.70%	6.70%	0 bps
UK	4.54%	4.51%	3 bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	631	631	0.0%
Inflation - WPI	1.89%	2.36%	(47) bps
Inflation - CPI	5.22%	5.48%	(26) bps

India GDP	Q2FY25	Q1FY25	Var(%)
Growth	5.36%	6.65%	(129) 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)	-1655	-1951	295.9

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

Bulk Deal As On 12/02/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
544224	AFCOM	VICTUS ENTERPRISE LLP	S	141840	728.04
544224	AFCOM	VICTUS ENTERPRISE LLP	B	6240	694.21
544353	AMWILL	AFFLUENCE MARKETING AND DISTRIBUTION PRIVATE LIMITED	B	183600	89.02
544353	AMWILL	AVIRAT ENTERPRISE	B	120000	88.85
544353	AMWILL	DRISHTI CHANDRAPRAKASH KHANDELWAL	B	134400	87.2
544353	AMWILL	EPITOME TRADING AND INVESTMENTS	B	150000	88.85
544353	AMWILL	JALPA KINCHIT MEHTA	B	105600	84.47
544353	AMWILL	JAYVANTI DHANJI CHHEDA	B	120000	88.85
544353	AMWILL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	105600	84.49
544353	AMWILL	RISHIKIRAN LOGISTICS PVT.LTD	B	453600	88.17
544353	AMWILL	ROLY YOGENDRA KAUSHIK	B	112800	84.65
544353	AMWILL	TRADE CORNER	B	200400	88.85
544353	AMWILL	VARUN KRISHNAVATAR KABRA	B	424800	89.25
544353	AMWILL	VIKASA INDIA EIF I FUND - SHARE CLASS P	S	230400	84.45
544347	CLN	NIKUNJ KAUSHIK SHAH	S	106800	281.22
544347	CLN	NIKUNJ KAUSHIK SHAH	B	106800	289.08
540455	ESCORP	ARVIND KUMAR BANSAL	S	372400	51.73
540455	ESCORP	ARVIND KUMAR BANSAL (HUF)	B	372400	51.76
508980	FRONTCAP	INIMITABLE CAPITALFINANCE PRIVATE LIMITED	S	200000	20.8
544348	GBLOGISTIC	HARSHA RAJESHBHAI JHAVERI	S	132000	52.84
544348	GBLOGISTIC	KALPESH MITHALAL DHAKAD	B	73200	51.56
544348	GBLOGISTIC	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	51600	51.56
544348	GBLOGISTIC	RAJESH NANUBHAI JHAVERI HUF	S	60000	51.57
540613	GEL	UTKARSH JAIN	B	16500	98.68
539449	IGCIL	SUNCITY WIZARD LLP	B	250000	7.25
535730	KHOBSURAT	DEALMONEY COMMODITIES PRIVATE LIMITED	S	2630000	0.56
530145	KISAN	APOLLO PIPES LIMITED	B	600000	43.86
544088	MEDIASSIST	ADITYA BIRLA SUN LIFE MUTUAL FUND	B	510925	492.99
542724	MURAE	HITESH SINGH	S	6610000	2.03
542724	MURAE	HITESH SINGH	B	3494647	2.02
511658	NETTLINX	MANOHAR REDDY LOKA	S	360000	96.99
511658	NETTLINX	NIRAJ RAJNIKANT SHAH	B	233850	96.93
530805	OIVL	ANEES ALNASIR GILANI	B	800000	9.9
530805	OIVL	DEALMONEY COMMODITIES PRIVATE LIMITED	S	500000	9.9
530805	OIVL	GILANI INFRA PRIVATE LIMITED	B	700000	9.9
530805	OIVL	NISHA HEMANTBHAI SHAH	S	250000	9.9
530805	OIVL	PARESH GUNVANTBHAI PATEL	S	277893	9.9
530805	OIVL	SAUMIL ARVINDBHAI BHAVNAGARI	S	799305	9.9
530805	OIVL	VIPUL NARAYANBHAI PATEL	S	365447	9.9
530805	OIVL	VIVEK MISHRA	B	650000	9.9
530805	OIVL	ZEENAT AL NASIR GILANI	B	500000	9.9
535657	OONE	SRINIVAS RAO MUDDANA NRO NON PIS	B	69365	8.9
526490	PRATIK	RAJIV HARIT	S	500000	7.3
519299	PRIMIND	ARTI MISHRA	S	99160	128.99
512591	PULSRIN	SEIFER RICHARD MASCARENHAS	S	400000	15.91
540159	PURPLE	ASHOKKUMAR SABURBHAI CHAVDA	S	149007	4.11
540159	PURPLE	BHISHMAASHLESHSAH	B	152583	4.11
544336	QUADFUTURE	HRTI PRIVATE LIMITED	S	219454	558.09
544336	QUADFUTURE	HRTI PRIVATE LIMITED	B	219863	556.84

511116	QUADRANT	IDBI TRUSTEESHIP SERVICES LTD	S	12338923	0.48
511116	QUADRANT	SHARE INDIA SECURITIES LIMITED	S	500000	0.48
511116	QUADRANT	SHARE INDIA SECURITIES LIMITED	B	3350000	0.5
512097	SAICOM	CHHOTELAL KUMAR BHAGAT	B	1267737	0.36
512097	SAICOM	KAMLESH BHANGADIA	S	1605020	0.36
540147	SHASHIJIT	MOHAN LAL GUPTA	B	578000	5.2
540147	SHASHIJIT	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	400000	5.2
540147	SHASHIJIT	VISHESH TONY JATIAA	B	321111	5.01
506122	VOLKAI	SUDHANSHU KANDA	B	2500	237.24

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
CHAMUNDA	Chamunda Electrical Ltd	ISHAAN TRADEFIN LLP	SELL	90000	63.2
KANDARP	Kandarp Dg Smart Bpo Ltd	LEENA HEMENDRA MEHTA	BUY	100000	51.35
KANDARP	Kandarp Dg Smart Bpo Ltd	RELIABLE DATA SERVICES LIMITED	SELL	100000	51.35
KATARIA	Kataria Industries Ltd	MULTITUDE GROWTH FUNDS LIMITED	SELL	123600	118.65
KEN	Ken Enterprises Limited	M7 GLOBAL FUND PCC - CELL DEWCAP FUND	BUY	319200	85
MEDIASSIST	Medi Assist Health Ser L	ADITYA BIRLA SUN LIFE MUTUAL FUND	BUY	589075	492.86
OLIL	Oneclick Logistics Ind L	GIRISH V BHATT HUF	BUY	50400	101
OLIL	Oneclick Logistics Ind L	KETAN RAJENDRABHAI ACHARYA	BUY	50400	101
OLIL	Oneclick Logistics Ind L	MAHESH LILADHAR BHANUSHALI	SELL	262800	104.23
OLIL	Oneclick Logistics Ind L	RAJAN SHIVRAM MOTE	SELL	265200	101.42
OLIL	Oneclick Logistics Ind L	SANJAY JAYANTILAL KOTHARI	BUY	20400	114.57
OLIL	Oneclick Logistics Ind L	SAROJ I SHETH	BUY	28800	101
DIAMONDYD	Prataap Snacks Limited	BHARAT VALUE FUND	BUY	611118	1147.48
DIAMONDYD	Prataap Snacks Limited	MALABAR INDIA FUND LIMITED	SELL	158769	1150.01
RAMANEWS	Shree Rama Newsprint Ltd	RIDDHI ANKIT DOSHI	BUY	785000	22
SIKKO	Sikko Industries Limited	ZETA GLOBAL FUNDS (OEIC) PCC LIMITED - ZETA SERIES B FUND PC	SELL	253243	89.72
VISHNUIFR	Vishnusurya Proj N Infr L	SETHURAMAN DHILIPKUMAR	SELL	149500	277.27
VISHNUIFR	Vishnusurya Proj N Infr L	VARALAKSHMI ENTERPRISES LLP	BUY	170000	276.57
VITAL	Vital Chemtech Limited	CRAFT EMERGING MARKET FUND PCC- ELITE CAPITAL FUND	BUY	129600	76.5
VITAL	Vital Chemtech Limited	V JOSHI IMPEX PRIVATE LIMITED	SELL	129600	76.5

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