

## Market Snapshot

KEY INDICES	10-Jan-25	03-Jan-25	%Ch
S&P CNX NIFTY	23431.50	24004.75	-2.39
SENSEX	77378.91	79223.11	-2.33
NIFTY MIDCAP 100	54585.75	57931.05	-5.77
NIFTY SMLCAP 100	17645.55	19033.70	-7.29

(Source: Capitaline, [Investing.com](https://www.investing.com))

## Sectoral Snapshot

KEY INDICES	10-Jan-25	03-Jan-25	%Ch
NIFTY BANK	48734.15	50988.80	-4.42
NIFTY AUTO	23017.75	24005.00	-4.11
NIFTY FMCG	57117.70	57817.00	-1.21
NIFTY IT	44609.50	43726.55	2.02
NIFTY METAL	8262.95	8729.95	-5.35
NIFTY PHARMA	22380.85	23263.50	-3.79
NIFTY REALTY	963.30	1045.10	-7.83
BSE CG	64232.65	68211.21	-5.83
BSE CD	62346.95	66283.95	-5.94
BSE Oil & GAS	25955.91	26818.40	-3.22
BSE POWER	6419.94	7034.20	-8.73

(Source: [Investing.com](https://www.investing.com))

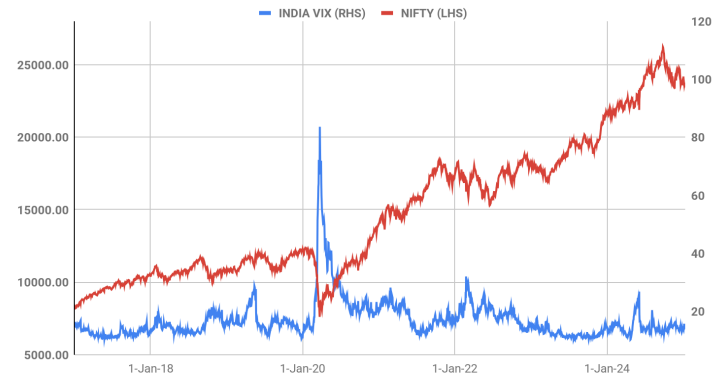
## FII & DII Activities (Rs Crore)

03/01/2025 to 10/01/2025

Activities	FIIs	DIIIs
Buy	68058.08	88274.93
Sell	84303.33	65771.57
Net	-16245.25	22503.36

(Source: Capitaline)

## Nifty Vs. INDIA VIX



(Source: [NSE](https://www.nse.com))

Barometers snap 2-week gains; Nifty ends below 23,450; Rupee hits record low twice in a week

The Domestic equity benchmarks posted significant losses this week, largely due to weak economic data. Concerns over India's falling foreign exchange and GDP growth projections pointing to a four-year low further weighed on market sentiment. Meanwhile, rising consumer price inflation in China and annual inflation in the Euro area added to global market jitters. The Indian rupee hit its lowest point twice, while the Japanese yen also weakened against the US dollar. Broader market indices declined sharply, with geopolitical instability exacerbating overall market volatility.

In the week ended on Friday, 10 January 2025, the S&P BSE Sensex slumped 1,844.20 points or 2.33% to settle at 77,378.91. The Nifty 50 index tumbled 573.25 points or 2.39% to settle at 23,431.50. The BSE Mid-Cap index dropped 5.74% to close at 44,240.89. The BSE Small-Cap index plummeted 6.04% to end at 52,722.34.

## Sensex Gainers - Weekly

SCRIPS	10-Jan-25	03-Jan-25	%Ch
TCS	4265.55	4099.25	<b>4.06</b>
HCLTECH	1995.60	1947.25	<b>2.48</b>
WIPRO	300.60	294.45	<b>2.09</b>
HINDUNILVR	2441.95	2405.50	<b>1.52</b>
INFY	1966.70	1938.30	<b>1.47</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	10-Jan-25	03-Jan-25	%Ch
NTPC	308.20	339.85	<b>-9.31</b>
TATASTEEL	127.40	138.30	<b>-7.88</b>
ULTRACEMCO	10866.20	11790.95	<b>-7.84</b>
SBIN	743.15	793.50	<b>-6.35</b>
INDUSINDBK	937.60	998.10	<b>-6.06</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	10-Jan-25	03-Jan-25	%Ch
TCS	4265.65	4099.90	<b>4.04</b>
UPL	548.85	529.55	<b>3.64</b>
HCLTECH	1995.10	1946.65	<b>2.49</b>
BRITANNIA	4939.20	4834.10	<b>2.17</b>
SBILIFE	1478.30	1447.70	<b>2.11</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	10-Jan-25	03-Jan-25	%Ch
NTPC	308.25	339.85	<b>-9.30</b>
TATASTEEL	127.43	138.36	<b>-7.90</b>
ULTRACEMCO	10865.20	11786.00	<b>-7.81</b>
ADANI PORTS	1112.20	1199.55	<b>-7.28</b>
COALINDIA	368.50	393.65	<b>-6.39</b>

(Source: Capitaline)

The HSBC India Services PMI surged from 58.4 in November to 59.3 in December, marking the most robust expansion in four months.

Concurrently, the HSBC India Composite Output Index, which reflects combined manufacturing and services activity, also strengthened, climbing from 58.6 in November to 59.2 in December, signifying the strongest growth in four months.

Meanwhile, India's foreign exchange (forex) reserves declined by \$4.112 billion to an eight-month low of \$640.279 billion during the week ended December 27, according to the latest RBI data.

Meanwhile, India's GDP growth is projected to slow down to a four-year low of 6.4% in the current fiscal year (2024-25), according to the first advance estimates released by the National Statistics Office. This lower-than-expected growth is attributed to weak industrial and investment activity. The estimate falls short of both the Reserve Bank of India's forecast (6.6%) and the government's projection (6.5-7%). While growth is expected to improve in the second half of the year, the initial slowdown is likely to impact the overall growth figure. These estimates are released early to assist the government in formulating the upcoming Union Budget.

### Global Markets:

China's services sector expanded in December at the fastest pace in seven months, driven by robust domestic demand. The Caixin services PMI surged to 52.2, exceeding both market expectations of 51.4 and the November reading of 51.5.

Meanwhile, China's consumer price inflation in December slipped to 0.1% year on year from 0.2% in November, data from the National Bureau of Statistics showed.

The Euro area annual inflation came at 2.4% in December 2024, up from 2.2% in November 2024.

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	10-Jan-25	03-Jan-25	%Ch
NAVINFLUOR	3630.95	3359.65	<b>8.08</b>
ZYDUSLIFE	1004.40	975.80	<b>2.93</b>
LTTS	4935.65	4795.50	<b>2.92</b>
MPHASIS	2915.00	2869.25	<b>1.59</b>
ESCORTS	3405.90	3371.90	<b>1.01</b>

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	10-Jan-25	03-Jan-25	%Ch
UNIONBANK	103.62	124.06	<b>-16.48</b>
POLICYBZR	1862.95	2215.85	<b>-15.93</b>
JSWENERGY	539.60	634.40	<b>-14.94</b>
RECLTD	459.35	538.05	<b>-14.63</b>
PAYTM	847.70	982.80	<b>-13.75</b>

(Source: Capitaline)

## World Markets

KEY INDICES	10-Jan-25	03-Jan-25	%Ch
DJIA	41938.45	42732.13	<b>-1.86</b>
NASDAQ	19161.63	19621.68	<b>-2.34</b>
BOVESPA	118856.48	118532.68	<b>0.27</b>
FTSE 100	8248.49	8223.98	<b>0.30</b>
CAC 40	7431.04	7282.22	<b>2.04</b>
DAX	20214.79	19906.08	<b>1.55</b>
MOEX RUSSIA	2824.59	2828.50	<b>-0.14</b>
NIKKEI 225	39190.40	39894.54	<b>-1.77</b>
HANG SENG	19064.29	19760.27	<b>-3.52</b>
STRAITS TIMES	3801.56	3801.83	<b>-0.01</b>
SHANGHAI COMPOSITE	3168.52	3211.43	<b>-1.34</b>
JAKARTA	7088.87	7164.43	<b>-1.05</b>

(Source: Capitaline, [Investing.com](https://www.investing.com))

Job openings, a measure of labour demand, rose 259,000 to 8.098 million by the last day of November, the Labour Department's Bureau of Labour Statistics said in its Job Openings and Labour Turnover Survey, or JOLTS report.

Meanwhile, U.S. services sector PMI increased to 54.1 in December from 52.1 in November.

(Source: Capitaline)

## Outlook and Technical View

Start of Q3FY25 results likely to remain in focus in coming week. Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar and crude oil prices will also dictate trend on the bourses in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be monitored.

From the technical standpoint, Nifty may find support at 23317, 23205, 23065, 22802 while levels of 23570, 23709, 23822, 24012 may act as resistance with pivot point at 23457.

(Source: Capitaline)

## Derivative Weekly Wrap

### OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
<b>NIFTY</b>	30-Jan-25	23515.00	24074.80	<b>-2.33%</b>	<b>83.50</b>	541733	504345	<b>7.41%</b>
<b>BANKNIFTY</b>	30-Jan-25	48886.65	51246.00	<b>-4.60%</b>	<b>152.50</b>	170971	158447	<b>7.90%</b>

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>BOSCHLTD</b>	31713.85	31888.35	30-Jan-25	<b>10.04%</b>
<b>BANDHANBNK</b>	143.96	144.67	30-Jan-25	<b>9.00%</b>
<b>TVSMOTOR</b>	2283.25	2294.30	30-Jan-25	<b>8.83%</b>
<b>EXIDEIND</b>	389.10	390.90	30-Jan-25	<b>8.44%</b>
<b>LICHSGFIN</b>	554.90	557.45	30-Jan-25	<b>8.39%</b>
<b>EICHERMOT</b>	5058.45	5081.65	30-Jan-25	<b>8.37%</b>
<b>PEL</b>	987.85	992.30	30-Jan-25	<b>8.22%</b>
<b>PIDILITIND</b>	2901.35	2914.10	30-Jan-25	<b>8.02%</b>
<b>NAUKRI</b>	7835.70	7870.05	30-Jan-25	<b>8.00%</b>
<b>NTPC</b>	308.25	309.60	30-Jan-25	<b>7.99%</b>

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>UBL</b>	2029.50	1992.25	30-Jan-25	<b>-33.50%</b>
<b>SHREECEM</b>	25738.30	25357.10	30-Jan-25	<b>-27.03%</b>
<b>TCS</b>	4265.65	4207.60	30-Jan-25	<b>-24.84%</b>
<b>IGL</b>	412.80	408.75	30-Jan-25	<b>-17.91%</b>
<b>SUNTV</b>	670.20	664.15	30-Jan-25	<b>-16.47%</b>
<b>HCLTECH</b>	1995.10	1981.85	30-Jan-25	<b>-12.12%</b>
<b>RBLBANK</b>	154.21	153.52	30-Jan-25	<b>-8.17%</b>
<b>PAGEIND</b>	46745.55	46615.50	30-Jan-25	<b>-5.08%</b>
<b>ASIANPAINT</b>	2320.75	2315.60	30-Jan-25	<b>-4.05%</b>
<b>ASHOKLEY</b>	210.57	210.15	30-Jan-25	<b>-3.64%</b>

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	52142750	46369450	<b>1.12</b>

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

<b>1. LTIM</b>	<b>2. TCS</b>	<b>3. LTTS</b>	<b>4. HCLTECH</b>	<b>5. WIPRO</b>
<b>6. MPHASIS</b>	<b>7. INFY</b>	<b>8. JSWENERGY</b>	<b>9. CGPOWER</b>	<b>10. BHEL</b>
<b>11. SUZLON</b>	<b>12. TORNTPOWER</b>	<b>13. TATAPOWER</b>	<b>14. NTPC</b>	<b>15. ADANIGREEN</b>
<b>16. NHPC</b>	<b>17. SIEMENS</b>	<b>18. ADANIPOWER</b>	<b>19. ABB</b>	<b>20. POWERGRID</b>

(Source: [Moneycontrol](#))

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Saltlake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : [research@shriraminsight.com](mailto:research@shriraminsight.com) | [www.shriraminsight.com](http://www.shriraminsight.com) |