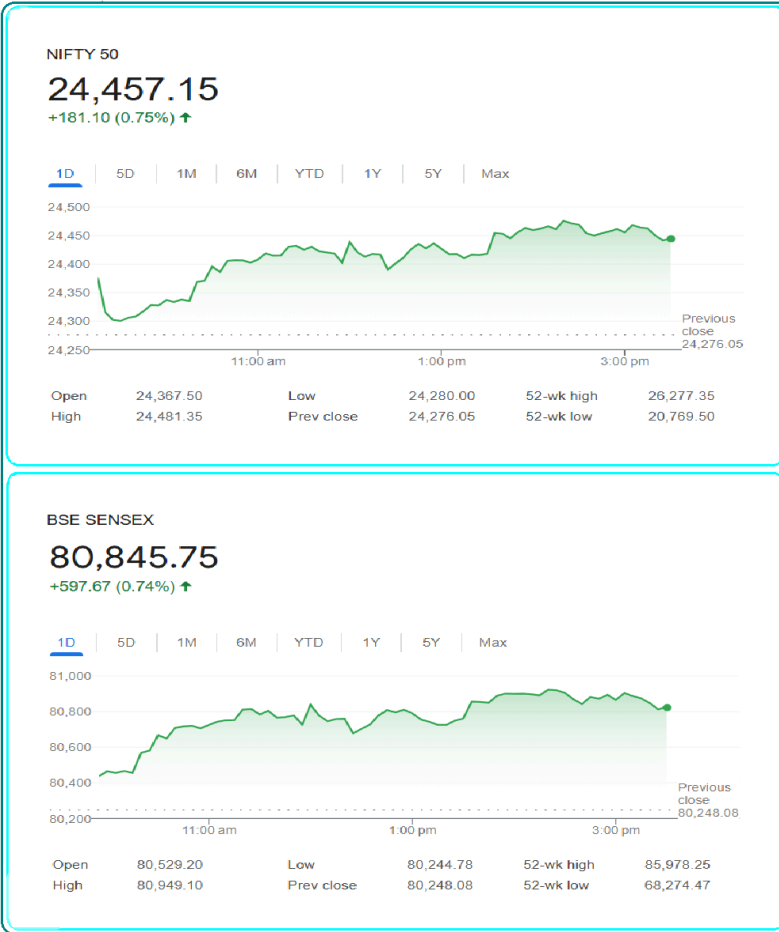


Index Chart



(Source: [Bloomberg](#))

Market Wrap Up

- The domestic equity benchmarks ended with significant gains, rising for the third day in a row. The Nifty settled above the 24,450 mark.
- The S&P BSE Sensex jumped 597.67 points or 0.74% to 80,845.75. The Nifty 50 index gained 181.10 points or 0.75% to 24,457.15.
- The S&P BSE Mid-Cap index rallied 0.92% and the S&P BSE Small-Cap index jumped 1.03%.
- Among the sectoral indices, the Nifty PSU Bank index (up 2.60%), the Nifty Media index (up 2.53%) and the Nifty Metal index (up 1.23%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty FMCG index (down 0.39%), the Nifty Healthcare index (up 0.13%) and the Nifty Realty index (up 0.32%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **December** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **6412** contracts at the end of the day.
- **Long** position build up for the **December** series has been witnessed in **LT, SBIN, ICICIBANK, HDFCBANK, INFY**.
- **Short** position build up for the **December** series has been witnessed in **BHARTIARTL, WIPRO**.
- **Unwinding** position for the **December** series has been witnessed in **RELIANCE, CIPLA, MARICO**.

(Source: Capitaline F&O)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24457.15	24276.05	0.75%
S&P BSE SENSEX	80845.75	80248.08	0.74%
NIFTY MID100	57509.00	57000.85	0.89%
NIFTY SML100	19003.55	18845.05	0.84%

(Source: [NSE](#), [BSE](#))

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	52695.75	52109.00	1.13%

NIFTY AUTO	23752.40	23599.60	0.65%
NIFTY FMCG	57689.20	57917.00	-0.39%
NIFTY IT	43754.95	43547.00	0.48%
NIFTY METAL	9246.25	9133.60	1.23%
NIFTY PHARMA	22445.70	22450.20	-0.02%
NIFTY REALTY	1054.60	1051.20	0.32%
BSE CG	71834.69	70962.90	1.23%
BSE CD	64060.87	63880.89	0.28%
BSE Oil & GAS	27146.00	26854.25	1.09%
BSE POWER	7600.95	7510.65	1.20%

(Source: [NSE](#), [BSE](#))

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39248.86	38513.02	1.91%
HANG SENG	19746.32	19550.29	1.00%
STRAITS TIMES	3786.13	3751.35	0.93%
SHANGHAI	3378.81	3363.98	0.44%
KOSPI	2500.10	2454.48	1.86%
JAKARTA	7196.02	7046.99	2.11%
TAIWAN	23027.46	22736.93	1.28%
KLSE COMPOSITE	1606.96	1595.48	0.72%
ALL ORDINARIES	8754.70	8705.00	0.57%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	115560.45	99059.85
NSE F&O	13308998.56	13146479.15

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	3664.67
NET SELL	-

(Source: [NSE](#))

Corporate News

- Adani's **Ambuja Cements** has partnered with Coolbrook from Finland to use zero-carbon heating technology in its cement manufacturing. This partnership aims to reduce fossil fuel dependency and carbon emissions.
- Solar Industries India Ltd** and its subsidiary have bagged orders of Rs. 2,039 crore for exporting defense products to overseas customers.
- MOIL** achieved its best ever November production of 1.63 lakh tonnes of manganese ore in November 2024. The company has achieved production of 11.80 lakh tonnes of manganese ore during the first eight months of CY25 (April - November 2024), registering a growth of 8.46% compared to the same period last year.
- Protean eGov Technologies** announced that it has received a work order worth Rs 161 crore from the Central Registry of Securitisation Asset Reconstruction and Security Interest of India (CERSAI) to maintain KYC records registry.
- Strand Life Sciences, a subsidiary of **Reliance Industries**, has introduced CancerSpot, a blood-based test for early cancer detection. It employs methylation profiling technology to identify tumor DNA fragments from blood samples. The test is tailored using data from Indian cohorts, making it relevant globally. This initiative aligns with Reliance's goal of advancing healthcare through genomics.
- Nazara Technologies Ltd** has announced Rs. 196 Crore in strategic investments to expand into gaming, entertainment, and education sectors.
- Pricol's** subsidiary, Pricol Precision Products (PPPL) will acquire injection moulded plastic component solutions division of Sundaram Auto Components for total consideration of Rs 215.3 crore.
- Apollo Micro Systems** announced that it has been declared the lowest bidder for orders worth Rs 21.42 crore from **Bharat Electronics (BEL)** and a private company.
- Safari Industries (India)**'s wholly owned subsidiary, Safari Manufacturing, has successfully commenced commercial production at its newly established

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ADANIPTS	1288.65	1215.80	5.99%
NTPC	367.45	358.20	2.58%
ADANIENT	2514.20	2457.05	2.33%
LT	3787.05	3704.05	2.24%
SBIN	853.95	836.40	2.10%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
BHARTIARTL	1620.55	1643.60	-1.40%
HEROMOTOCO	4697.00	4748.45	-1.08%
ITC	472.55	477.20	-0.97%
HDFCBANK	634.00	640.20	-0.97%
SUNPHARMA	1800.05	1808.55	-0.47%

(Source: [Moneycontrol](#))

manufacturing facility in Jaipur, Rajasthan.

- **Tata Power Company** said that its subsidiary, Tata Power Renewable Energy, successfully commissioned the 431 MW DC solar project at Neemuch in Madhya Pradesh.
- **Gland Pharma** received approval from the United States Food and Drug Administration (USFDA) for Latanoprost Ophthalmic Solution.
- **Indoco Remedies** announced that it has entered into a strategic partnership with Clarity Pharma, UK to launch 20 products in UK market.
- **Godavari Biorefineries** announced the signing of a strategic international license agreement with Catalyx Inc for manufacturing biobutanol and higher alcohols in India.
- **Bharat Petroleum Corporation** announced that it has signed a non-binding memorandum of understanding (MoU) with Coal India on 2 December 2024 for setting up coal to SNG plant.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

Global News

- U.S. S&P Global manufacturing PMI was revised higher to 49.7 in November 2024 from a preliminary of 48.8, and compared to 48.5 in October.
- U.S. ISM said its manufacturing PMI rose to 48.4 in November from 46.5 in October.
- Australia's current account deficit decreased to AUD 14.1 billion in Q3 2024 from an upwardly revised AUD 16.4 billion shortfall in Q2.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

Economic News

- Crude Oil traded at US\$ 68.88/bbl (IST 17:00).
- INR strengthened to Rs. 84.69 from Rs. 84.70 against each US\$ resulting in daily change of 0.01%.
- Morgan Stanley has again cut its GDP growth projection for India to 6.3% for this fiscal year, down from its earlier estimate of 6.7%. This come days after India's GDP slowed to a seven quarter low in the July-September quarter. Morgan Stanley had cut India's growth target for FY25 to 6.7% earlier in November and ahead of the Q2 GDP data.
- India has exported organic food products worth nearly USD 450 million till November 25 of the current fiscal year, the government said on Monday. The country has exported 2,63,050 tonnes for USD 447.73 million till November 25 of the current fiscal.

(Source: [Economic Times](#), [Business Standard](#))

Forthcoming Events

Board Meetings as on 04/12/2024

Aarey Drugs & Pharmaceuticals Limited	Fund Raising
Eros International Media Limited	Financial Results
Fusion Finance Limited	Fund Raising
Rushabh Precision Bearings Limited	Financial Results

(Source: NSE)

Corporate Actions as on 04/12/2024

Can Fin Homes Limited	Interim Dividend - Rs 6 Per Share
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(Source: NSE)

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