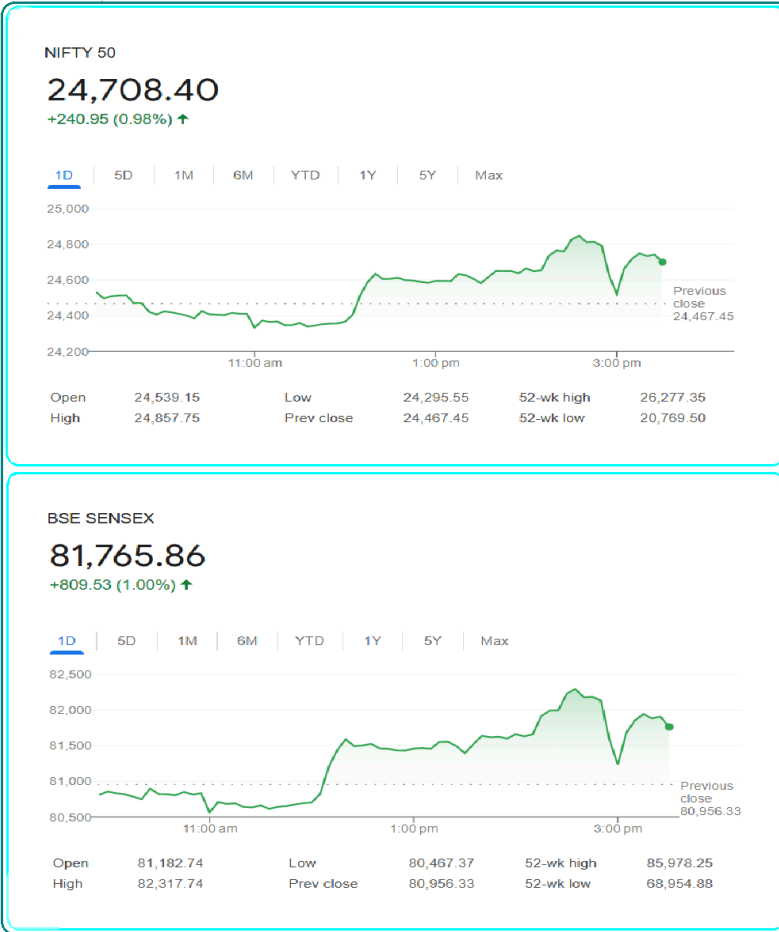


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24708.40	24467.45	0.98%
S&P BSE SENSEX	81765.86	80956.33	1.00%
NIFTY MID100	58441.55	58112.40	0.57%
NIFTY SML100	19333.55	19173.55	0.83%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	53603.55	53266.90	0.63%

Market Wrap Up

- The key equity benchmark ended a volatile session with significant gains, rising for the fifth day in a row. The Nifty settled above the 24,700 level after hitting the day's low of 24,295.55 in mid-morning trade. Trading was volatile due to the weekly F&O series expiry today.
- The S&P BSE Sensex surged 809.53 points or 1% to 81,765.86. The Nifty 50 index jumped 240.95 points or 0.98% to 24,708.40.
- The S&P BSE Mid-Cap index rose 0.27% and the S&P BSE Small-Cap index added 0.16%.
- Among the sectoral indices, the Nifty IT index (up 1.95%), the Nifty Oil & Gas index (up 0.74%) and the Nifty Private Bank index (up 0.69%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Realty index (down 0.25%), the Nifty PSU Bank index (up 0.12%) and the Nifty Media index (up 0%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **December** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **5187** contracts at the end of the day.
- **Long** position build up for the **December** series has been witnessed in **LT, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.
- **Short** position build up for the **December** series has been witnessed in **BAJAJ-AUTO, PRESTIGE, DIVISLAB, DELHIVERY**.
- **Unwinding** position for the **December** series has been witnessed in **RELIANCE, WIPRO, GRASIM**.

(Source: Capitaline F&O)

NIFTY AUTO	23736.25	23584.00	0.65%
NIFTY FMCG	57605.20	57270.35	0.58%
NIFTY IT	44806.40	43949.25	1.95%
NIFTY METAL	9282.75	9230.10	0.57%
NIFTY PHARMA	22463.40	22422.90	0.18%
NIFTY REALTY	1074.45	1077.15	-0.25%
BSE CG	72612.92	72231.45	0.53%
BSE CD	64928.68	64502.97	0.66%
BSE Oil & GAS	27273.66	27129.74	0.53%
BSE POWER	7613.06	7597.78	0.20%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39395.60	39276.39	0.30%
HANG SENG	19560.44	19742.46	-0.92%
STRAITS TIMES	3822.68	3799.94	0.60%
SHANGHAI	3368.86	3364.65	0.13%
KOSPI	2441.85	2464.00	-0.90%
JAKARTA	7313.31	7326.76	-0.18%
TAIWAN	23267.94	23255.33	0.05%
KLSE COMPOSITE	1615.64	1614.09	0.10%
ALL ORDINARIES	8744.50	8728.50	0.18%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	132760.85	119361.32
NSE F&O	51670507.08	19800678.74

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	8539.91
NET SELL	-

(Source: [NSE](#))

Corporate News

- Tata Motors** announced that total Jaguar Land Rover (JLR) registrations in UK declined 11.09% to 5,558 units in November 2024 as compared with 6,251 units in November 2023. New car registrations in the United Kingdom (UK) recorded 1.9% decline in November 2024 to 153,610 units from 156,525 units in November 2023. Land Rover car registrations rose 2.57% to 4,833 units in November 2024 from 4,712 units in November 2023. While Jaguar car registrations tumbled 52.89% to 725 units in November 2024 as compared with 1,539 units in November 2023.
- ONGC NTPC Green Pvt Ltd** (ONGPL) is acquiring a 100% stake in Ayana Renewable Power for \$700-750 million. The deal values Ayana at \$1.7-1.8 billion and includes 4.6 GW of operational and under-construction renewable energy assets.
- Torrent Pharma** has entered into an agreement to acquire three brands-Cospiaq (empagliflozin), Cospiaq Met (empagliflozin + metformin), and Xilingio (empagliflozin + linagliptin)—from Boehringer Ingelheim International GmbH (BI). The acquisition will be completed by March 2025.
- Blue Dart** has launched Blue Dart Affiliate Program (BDAP) for its technology partners and ecosystem enablers. The program aims to strengthen partnerships with leading tech enablers, enabling smooth integration of Blue Dart's advanced logistics solutions.
- L&T** has successfully acquired 15% stake in E2E Networks Ltd through a preferential allotment. At the same time, it has also purchase an additional 6% stake from E2E Networks' promoters.
- Aurobindo Pharma** announced that its wholly owned subsidiary company, Eugia Pharma Specialities, has received final approval from the US Food & Drug Administration (USFDA) to manufacture and market Pazopanib Tablets, 200 mg, which is bioequivalent and therapeutically equivalent to the reference listed drug (RLD), Votrient Tablets, 200 mg, of Novartis Pharmaceuticals Corporation. The product is expected to be launched in Q4FY25. The approved product has an estimated market size of US\$ 106 million for the twelve

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TCS	4464.05	4354.40	2.52%
INFY	1934.85	1889.25	2.41%
TITAN	3441.05	3364.45	2.28%
TRENT	6970.10	6823.80	2.14%
DRREDDY	1239.85	1215.55	2.00%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SBILIFE	1431.85	1452.60	-1.43%
BAJAJ-AUTO	8891.95	8999.15	-1.19%
HDFCLIFE	643.15	650.25	-1.09%
NTPC	369.15	372.75	-0.97%
GRASIM	2706.80	2717.30	-0.39%

(Source: [Moneycontrol](#))

months ending October 2024, according to IQVIA.

- **Adani Energy Solutions** has received a Letter of Intent (LoI) from REC Power Development and Consultancy for establishing a transmission system to evacuate power from the 20 GW Renewable Energy Zone (REZ) in Rajasthan.
- **RailTel Corporation of India** announced that it has received the work order worth Rs 10.64 crore from Gail (India).
- **Bondada Engineering** has received a work order worth Rs 108.90 crore from the Bihar Renewable Energy Development Agency under the Mukhyamantri Gramin Solar Street Light Yojana.
- **Lemon Tree Hotels** received a letter of award (LoA) from the Directorate of Tourism Shillong, for the re-development of Orchid Hotel, located at Shillong City, Meghalaya.

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

Global News

- U.S. ADP said private sector employment climbed by 146,000 jobs in November after jumping by a downwardly revised 184,000 jobs in October.
- U.S. S&P Global composite PMI Output Index climbed to 54.9 in November, a 31-month high, up from 54.1 in October. The services PMI was revised lower to 56.1 in November 2024 from a preliminary of 57, but was still above 55 in October.
- U.S. ISM said its services PMI fell to 52.1 in November from 56.0 in October.
- U.S. factory orders rose by 0.2% in October after dipping by a revised 0.2% in September.
- Eurozone retail sales declined 0.5% month-over-month in October 2024, reversing a 0.5% rise in September. Year-on-year, retail sales in the Eurozone increased 1.9%, following an upwardly revised 3% rise in September.
- German factory orders declined by 1.5% mom in October 2024, following an upwardly revised 7.2% surge in the previous month.
- French industrial production fell for the second consecutive period by 0.1% month-on-month, easing from a revised 0.8% drop in September. On an annual basis, industrial production fell by 0.6%, maintaining the same pace as in September.
- Australia posted a seasonally adjusted merchandise trade surplus of A\$5.953 billion in October, following the downwardly revised A\$4.532 billion surplus in September (originally A\$4.609 billion). Exports rose 3.6% on month to A\$42.148 billion

after falling a downwardly revised 4.7% in the previous month (originally -4.3%). Imports were up 0.1% on month to A\$36.195 billion after dropping an upwardly revised 2.8% a month earlier (originally -3.1%).

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

Economic News

- Crude Oil traded at US\$ 68.98/bbl (IST 17:00).
- INR strengthened to Rs. 84.73 from Rs. 84.74 against each US\$ resulting in daily change of 0.01%.
- India's external debt rose by USD 31 billion to reach USD 646.79 billion in 2023, according to the World Bank's International Debt Report. Interest payments also increased significantly from USD 15.08 billion in 2022 to USD 22.54 billion in 2023. Long-term debt stocks grew by 7% to USD 498 billion, while short-term debt declined slightly to USD 126.32 billion.

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

Forthcoming Events

Board Meetings as on 06/12/2024

Avonmore Capital & Management Services Limited	Fund Raising
Bang Overseas Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 06/12/2024

Sikko Industries Limited	Rights 3:10 @ Premium Rs 88/-
Strides Pharma Science Limited	Demerger

(Source: NSE)

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