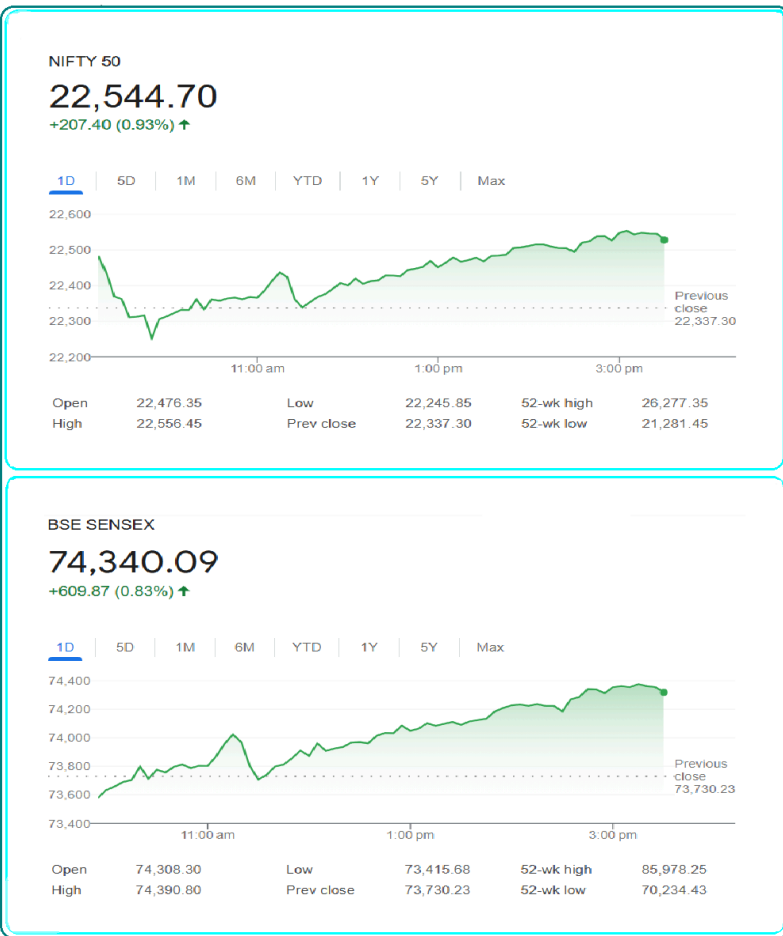


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22544.70	22337.30	0.93%
S&P BSE SENSEX	74340.09	73730.23	0.83%
NIFTY MID100	49348.10	49168.35	0.37%
NIFTY SML100	15400.35	15199.10	1.32%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	48627.70	48489.95	0.28%

Market Wrap Up

- The key benchmark indices ended with substantial gains, rising for the second consecutive session. The Nifty ended above the 22,500 level after hitting day's low of 22,245.85 in early trade. Trading was volatile due to the weekly Nifty50 F&O series expiry today.
- The S&P BSE Sensex surged 609.86 points, or 0.83%, to 74,349.09. The Nifty 50 index added 207.40 points, or 0.93%, to 22,544.70.
- The S&P BSE Mid-Cap index rose 0.65%, and the S&P BSE Small-Cap index added 1.63%.
- Among the sectoral indices, the Nifty Oil & Gas index (up 2.59%), the Nifty Metal index (up 2.34%) and the Nifty Pharma index (up 1.47%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Realty index (down 0.17%), the Nifty PSU Bank index (up 0.66%), the Nifty Private Bank index (up 0.54%) were underperformed the Nifty50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **March** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **7811** contracts at the end of the day.
- **Long** position build up for the **March** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, INFY, TCS**.
- **Short** position build up for the **March** series has been witnessed in **HDFCBANK, WIPRO, ITC, TRENT, COFORGE**.
- **Unwinding** position for the **March** series has been witnessed in **ICICIBANK, LTIM, GRASIM, CESC**.

(Source: Capitaline F&O)

NIFTY AUTO	20959.70	20796.75	0.78%
NIFTY FMCG	51890.30	51279.10	1.19%
NIFTY IT	38145.30	38072.30	0.19%
NIFTY METAL	8888.65	8685.20	2.34%
NIFTY PHARMA	20423.35	20126.80	1.47%
NIFTY REALTY	826.15	827.55	-0.17%
BSE CG	58634.88	58160.24	0.82%
BSE CD	54581.31	54482.81	0.18%
BSE Oil & GAS	23815.47	23265.37	2.36%
BSE POWER	6188.83	6105.24	1.37%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	37704.93	37418.24	0.77%
HANG SENG	24369.71	23594.21	3.29%
STRAITS TIMES	3917.06	3898.40	0.48%
SHANGHAI	3381.10	3341.96	1.17%
KOSPI	2576.16	2558.13	0.70%
JAKARTA	6617.85	6531.40	1.32%
TAIWAN	22715.43	22871.90	-0.68%
KLSE COMPOSITE	1558.91	1564.42	-0.35%
ALL ORDINARIES	8326.40	8363.10	-0.44%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	94950.10	96043.58
NSE F&O	48244343.78	19783202.95

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2895.04

(Source: [NSE](#))

Corporate News

- TCS** has entered into a partnership with Vantage Towers for launch of digital service platform aimed at improving the experience of property owners leasing land for installation of telecom towers. The platform will make service processes easy, enhance property owner retention, and bolster telecom site partnerships across Europe.
- Wipro** has introduced TelcoAI360, an AI-first services platform. It is designed to help telecom operators technology solutions while enhancing customer experience at slashed prices. TelcoAI360 is aimed at streamlining operations, strengthening security, and improvising network performance for telecom providers.
- Zydu Lifesciences** has received final United States Food and Drug Administration (USFDA) approval for marketing Dasatinib tablets in a variety of vials. The tablets shall be available in 20 mg, 50 mg, 70 mg, 80 mg, 100 mg, and 140 mg. The launched drug is a generic version of Sprycel Tablets.
- Ola Electric** becomes the first two-wheeler EV manufacturer in India to receive incentives under the PLI-Auto Scheme. The company was granted Rs 73.74 crore for the Determined Sales Value of FY 2023-24, highlighting its leadership in the EV sector and commitment to local manufacturing.
- Aurobindo Pharma** has terminated a license agreement through its subsidiary Auro Vaccines with Hilleman Laboratories for developing a pentavalent vaccine for children. The company asserted that this step would not materially affect its financial situation, as Auro Vaccines is not a crucial subsidiary.
- RPP Infra Projects** has received a letter of acceptance (LoA) for a contract worth Rs 80.98 Crore, including taxes (GST). The Chennai Metropolitan Water Supply and Sewerage Board has awarded the contract. The project is for improvisation of water supply infrastructure under the Vada Chennai Valarchi Thittam initiative in Tamil Nadu.
- Galaxy Surfactants** announced a strategic collaboration with a global customer for providing engineering, procurement, and construction services (EPC).

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ASIANPAINT	2267.70	2164.15	4.78%
COALINDIA	382.60	368.25	3.90%
HINDALCO	681.95	657.35	3.74%
BPCL	265.04	255.84	3.60%
NTPC	337.90	326.20	3.59%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TECHM	1503.45	1538.10	-2.25%
TRENT	5069.50	5106.10	-0.72%
BEL	272.95	274.92	-0.72%
KOTAKBANK	1921.70	1933.10	-0.59%
HDFCLIFE	618.25	621.20	-0.47%

(Source: [Moneycontrol](#))

- **GHV Infra Projects** announced that it has received an order from GHV (India) worth Rs 363 crore for setting up a solar power project on an EPC basis.
- **OM Infra** has secured two significant water supply infrastructure projects worth Rs 448 crore from Uttar Pradesh Jal Nigam (Rural).
- **Hexaware Technologies** announced a new collaboration with the San Francisco Unicorns, a team in Major League Cricket.
- **INOX India** announced that it has received multiple orders worth Rs 190 crore.
- Greaves Electric Mobility (GEML), the electric mobility arm of **Greaves Cotton** (GCL), has partnered with Indofast Energy, a 50-50 joint venture between Indian Oil and SUN Mobility to enhance last-mile transportation for B2B fleets and ride-sharing services by aiming to offer innovative, efficient and tailored e-2W and energy solutions that meet the industry's evolving needs.
- **Capitalnumbers Infotech** announced the signing of a Memorandum of Understanding (MOU) with Myren Inc, at the Mobile World Congress (MWC) Barcelona 2025.
- **G M Breweries** has decided to incorporate a wholly owned subsidiary(WOS), Buildfort Infradev Private, to venture into infrastructure development space.
- **Bharat Forge** announced that its wholly-owned subsidiary, Kalyani Powertrain, entered into a technology licensing agreement with Taiwan's Compal Electronics to manufacture X86 platform servers in India.

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

Global News

- U.S. factory orders increased by 1.7% month-over-month in January 2025, following two consecutive months of declines.
- U.S. S&P Global Composite PMI came in at 51.6 in February 2025, revised up from the preliminary estimate of 50.4 but down from the previous month's 52.7. The services PMI fell to 51 in February of 2025 from 52.9 in the previous month.
- U.S. ISM Services PMI unexpectedly increased to 53.5 in February 2025 from 52.8 in January.
- Eurozone retail trade fell by 0.3% month-over-month in January 2025, following two months of flat. Retail sales slowed to 1.5% year-on-year in January 2025 from a revised 2.2% in December.
- Australia's trade surplus on goods increased to AUD 5.62 billion in January 2025, up from a downwardly revised AUD 4.92 billion in December 2024. Exports rose 1.3% from the previous month to an eleven-month high of AUD 44.53 billion, after

an upwardly revised 1.2% growth in December. Imports of goods fell by 0.3% month-over-month to AUD 38.91 billion in January 2025, shifting from a surge of 5.9% in the previous month.

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

Economic News

- Crude Oil traded at US\$ 66.44/bbl (IST 17:00).
- INR weakened to Rs. 87.11 from Rs. 86.96 against each US\$ resulting in daily change of 0.17%.
- U.S. crude oil exports to India surged to their highest level in over two years, reaching about 357,000 barrels per day in February. This increase stems from Indian refiners seeking alternative supplies due to tighter U.S. sanctions on Russia. The major buyers included Indian Oil Corp, Reliance Industries, and Bharat Petroleum Corp.
- The Cabinet has approved modifications to the Livestock Health and Disease Control Programme, allocating Rs 75 crore for distributing affordable, high-quality generic veterinary medicines under the new Pashu Aushadhi component. These medicines will be distributed through PM Kisan Samridhi Kendras and cooperatives, aiming to support farmers. Traditional veterinary medicine knowledge will also be documented and revived.

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

Forthcoming Events

Board Meetings as on 07/03/2025

AU Small Finance Bank Limited	Fund Raising
Emkay Global Financial Services Limited	Fund Raising
G R Infraprojects Limited	Dividend
Sun TV Network Limited	Dividend

(Source: NSE)

Corporate Actions as on 07/03/2025

Metro Brands Limited	Interim Dividend - Rs 3 Per Share & Special Dividend - Rs 14.50 Per Share
SBI Life Insurance Company Limited	Interim Dividend - Rs 2.70 Per Share

(Source: NSE)

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