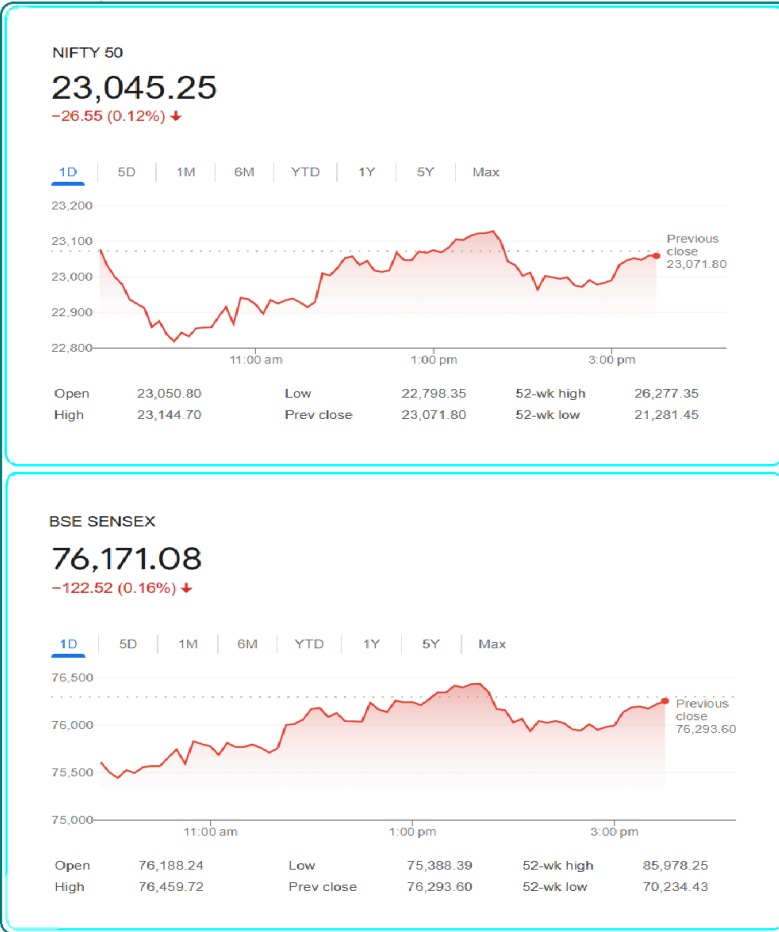


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23045.25	23071.80	-0.12%
S&P BSE SENSEX	76171.08	76293.60	-0.16%
NIFTY MID100	50756.40	50887.95	-0.26%
NIFTY SML100	16033.00	16074.35	-0.26%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	49479.45	49403.40	0.15%

Market Wrap Up

- The domestic equity benchmarks ended with minor losses, declining for the sixth day in a row, as concerns over global uncertainties and earnings dampened investor sentiment. The Nifty closed below the 23,050 mark.
- The S&P BSE Sensex declined 122.52 points or 0.16% to 76,171.08. The Nifty 50 index lost 26.55 points or 0.12% to 23,045.25. In six consecutive trading sessions, the Sensex and Nifty lost 3.07% and 2.92%, respectively.
- The S&P BSE Mid-Cap index fell 0.45%, and the S&P BSE Small-Cap index slumped 0.49%.
- Among the sectoral indices, the Nifty PSU Bank index (up 0.84%), the Metal index (up 0.67%) and the Nifty Financial Services index (up 0.45%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Realty index (down 2.74%), the Nifty Oil & Gas index (down 0.80%) and the Nifty Auto index (down 0.74%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **February** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **10106** contracts at the end of the day.
- **Long** position build up for the **February** series has been witnessed in **LT, BHARTIARTL, HDFCBANK, VEDL**.
- **Short** position build up for the **February** series has been witnessed in **RELIANCE, ICICIBANK, INFY, TCS, LTTS**.
- **Unwinding** position for the **February** series has been witnessed in **SBIN, IDEA**.

(Source: Capitaline F&O)

NIFTY AUTO	22407.45	22573.90	-0.74%
NIFTY FMCG	53739.00	53794.25	-0.10%
NIFTY IT	41733.00	41968.30	-0.56%
NIFTY METAL	8268.40	8213.55	0.67%
NIFTY PHARMA	21142.05	21249.50	-0.51%
NIFTY REALTY	839.35	863.00	-2.74%
BSE CG	58923.77	58827.26	0.16%
BSE CD	56276.63	56340.95	-0.11%
BSE Oil & GAS	23833.99	23983.21	-0.62%
BSE POWER	5971.62	5996.00	-0.41%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38963.70	38801.17	0.42%
HANG SENG	21857.92	21294.86	2.64%
STRAITS TIMES	3874.62	3860.76	0.36%
SHANGHAI	3346.39	3318.06	0.85%
KOSPI	2548.39	2539.05	0.37%
JAKARTA	6645.78	6531.99	1.74%
TAIWAN	23289.75	23384.05	-0.40%
KLSE COMPOSITE	1603.05	1589.95	0.82%
ALL ORDINARIES	8799.60	8751.60	0.55%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	104609.92	87197.43
NSE F&O	26654509.03	13833958.57

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4969.30

(Source: [NSE](#))

Corporate News

- Hindustan Aeronautics Ltd** reported 14% jump in consolidated net profit at Rs 1,440 crore for the quarter ended December 31, 2024, driven by sustained demand for its aircraft from the defence ministry. It reported consolidated net profit of Rs 1,261 crore in the year-ago period. Revenue rose 15% to Rs 6,957 crore in Q3FY25 as against Rs 6,061 crore in Q3FY24.
- Lupin's** consolidated net profit jumped 38.81% to Rs 858.86 crore on 10.60% increase in sales to Rs 5,618.6 crore in Q3 FY25 over Q3 FY24.
- NBCC (India)** reported a 25.41% increase in consolidated net profit to Rs 142.43 crore in Q3 FY25 as against Rs 113.57 crore in Q3 FY24. Revenue from operations rose 16.65% year on year (YoY) to Rs 2,826.95 crore in the quarter ended 31 December 2024.
- Steel Authority of India Ltd** reported a 66.5% year-on-year (YoY) decline in net profit to Rs. 141.9 crore for the quarter ended 31 December 2022 (Q3 FY25). The company's net profit stood at Rs. 422.9 crore in the same quarter last year. Revenue from operations grew 4.9% YoY to Rs. 24,489.9 crore Vs Rs. 23,348.6 crore in Q3 FY24.
- Ashok Leyland** achieved an all-time high net profit of Rs 762 crore in Q3FY25, an increase of 31% over same period last year. It recorded all time high revenues of Rs 9,479 crore in Q3FY25 vis a vis Rs 9,273 crore in Q3 FY24, up 2.22% year-on-year.
- Jaypee Infratech** announced a 15-fold jump in its net profit for the quarter ended December 2024. The company reported a net profit of Rs. 1,365.90 Crore, on the back of exceptional gain of Rs. 514.50 Crore. In the previous corresponding quarter, the company reported net profit of Rs. 92 Crore in Q3FY24. Revenue witnessed a sixfold jump at Rs. 1,317.20 Crore versus Rs. 218.60 Crore in the previous quarter under review.
- Hi-Tech Pipes** posted consolidated net profit rose 33.64% to Rs 19.15 crore in the quarter ended December 2024 as against Rs 14.33 crore during the previous quarter ended December 2023. Sales rose 20.78% to Rs 761.02 crore in the quarter ended December 2024 as against Rs 630.10 crore during the previous quarter ended December 2023.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BAJAJFINSV	1788.70	1744.85	2.51%
SBILIFE	1452.15	1419.00	2.34%
HDFCLIFE	629.15	618.60	1.71%
TATASTEEL	132.28	130.11	1.67%
SHRIRAMFIN	547.15	538.55	1.60%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
M&M	2987.20	3085.95	-3.20%
EICHERMOT	4849.45	4972.35	-2.47%
BEL	259.15	265.05	-2.23%
ITC	409.90	418.30	-2.01%
HEROMOTOCO	4015.75	4085.55	-1.71%

(Source: [Moneycontrol](#))

- **Patanjali Foods Limited** has posted a 71% year-on-year rise in consolidated net profit at Rs. 370 crore for the October-December quarter (Q3 FY25). The company had reported a net profit of Rs. 217 crore for same quarter last year. Revenue grew by 15% YoY to Rs. 9,103 crore, compared to Rs. 7,911 crore in Q3 FY24.
- **BLS International** announced a 43.20% year-on-year growth in its Q3 net profit at Rs. 121 Crore, compared to Rs. 84.50 Crore in the previous corresponding quarter. The company posted a 17% y-o-y growth in revenue from operations to Rs. 513 Crore versus Rs. 438 Crore in the quarter ended December 2023.
- **Indian Railway Catering and Tourism Corporation** reported a 13.70% year-on-year growth in its net profit at Rs. 341 Crore, against Rs. 300 Crore in the previous comparable quarter. Revenue witnessed a 10% jump, aggregating to Rs. 1,224.70 Crore against Rs. 1,115.50 Crore in Q3FY24.
- **MOIL** posted standalone net profit jumped 17.7% to Rs 63.68 crore in Q3 FY25, compared to Rs 54.10 crore recorded in Q3 FY24. Revenue from operations grew 19.8% YoY to Rs 366.82 crore in the quarter ended 31 December 2024.
- **Vodafone Idea** has reported a consolidated net loss of Rs 6,609.3 crore in Q3 FY25 as against a net loss of Rs 6,985.9 crore posted in Q3 FY24. Revenue from operations rose by 4.16% to Rs 11,117.3 crore in the third quarter from Rs 10,673.1 crore recorded in the same period last year.
- **Gensol Engineering** posted consolidated net profit declined 22.11% to Rs 17.86 crore in Q3 FY25 as against Rs 22.93 crore in Q2 FY25. Revenue from operations shed 0.42% to Rs 345.34 crore in Q3 FY25 over Q2 FY25. PBT tumbled 35.70% to Rs 15.97 crore in Q3 FY25 over Q2 FY25.
- **IRCON International** posted consolidated net profit dropped 64.81% to Rs 86.10 crore in Q3 FY25, compared to Rs 244.70 crore in Q3 FY24. Revenue from operations declined 10.81% to Rs 2,612.86 crore during the quarter, compared to Rs 2,929.54 crore in the same quarter last year.
- **TVS Motor Company** will invest Rs 2,000 crore in Karnataka over the next five years to set up a global capability centre, expand production and engineering in Mysuru. This initiative aims to attract top talent, foster innovation, and enhance research capabilities, bolstering its 2030 goals and increasing exports and overall revenue from its Mysuru operations.
- **Natco Pharma Ltd** has received final approval from the USFDA to market Bosentan 32mg tablets. This drug, Bosentan 32mg tablets is used for the treatment of pulmonary arterial hypertension (PAH). This drug is usable for children aged 3 years and above. This provides an opportunity for the company to market a generic equivalent of Tracleer, a drug produced by Actelion Pharmaceuticals US Inc.
- Biovet, a **Bharat Biotech group company**, has launched Biolumpivaxin, a Lumpy Skin Disease (LSD) vaccine for dairy cattle and buffaloes. The company claims Biolumpivaxin is the world's first Differentiating Infected from Vaccinated Animals (DIVA) marker vaccine, approved by the Central Drugs Standard Control Organization (CDSCO).

- **KPI Green Energy Ltd** announced that its subsidiary, Sun Drops Energia Pvt Ltd, has received letters of award for developing solar power projects with a total capacity of 15.9 MW.
- **Cyient DLM** has secured production contract from Boeing Global Services (BGS) for precision-machined parts and assemblies, marking a key milestone in their partnership.
- **Suzlon Group** has secured a repeat order of 201.6 MW from Oyster Renewable.
- **Glenmark Pharmaceuticals** has announced the launch of Clindamycin Phosphate Foam, which is a bioequivalent and therapeutically equivalent to the reference listed drug, Evoclin Foam of Mylan Pharmaceuticals Inc.

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

Global News

- Italy industrial production fell 3.1% month-over-month in December 2024, after a 0.3% increase in November. Considering Q4, industrial output fell by 1.2%, extending 0.7% decrease in Q3.
- Finland's current account surplus rose to EUR 926 million in December from EUR 263 million in November.
- Indonesia's retail sales rose 0.4% year-on-year in January, slower than the 1.8% rise a month ago. On a monthly basis, sales decreased 4.8% after a 5.9% rebound in December.
- Malaysia's retail sales logged an annual growth of 5.4% in December, slower than the 5.8% gain in November. During the year 2024, total retail sales climbed 4.2% compared to 2023, and wholesale trade advanced by 5.3%.
- Brazil's consumer price inflation climbed 4.56% year-over-year in January, slower than the 4.83% rise in December. On a monthly basis, consumer prices edged up 0.16% versus a 0.52 gain in December.
- Czech Republic's consumer price inflation climbed 2.8% year-over-year in January, slower than the 3.0% rise in December. On a monthly basis, consumer prices moved up 1.3%.

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

Economic News

- Crude Oil traded at US\$ 72.42/bbl (IST 17:00).
- INR weakened to Rs. 86.88 from Rs. 86.83 against each US\$ resulting in daily change of 0.06%.
- India's annual inflation rate fell to 4.31% in January of 2025 from 5.22% in the previous month. From the previous month, the Indian CPI fell by 0.97%.
- India's industrial production grew by 3.2% year-on-year in December 2024, slowing from a downwardly revised 5% rise in November. This was mainly due to a slowdown in manufacturing activity (3% vs 5.5% in November). Meanwhile,

production rose further for mining (2.6% vs 1.9%) and electricity (6.2% vs 4.4%). On a monthly basis, industrial output increased by 6.1% in December, rebounding from an upwardly revised 1.4% drop in the previous month. In the April-December period, industrial production rose by 4%.

- Net direct tax collection grew 14.69% to over Rs 17.78 lakh crore this fiscal, with personal income tax up 21% to Rs 9.48 lakh crore, and corporate tax up 6% to Rs 7.78 lakh crore. STT collections increased by 65% to Rs 49,201 crore. Over Rs 4.10 lakh crore in refunds were issued, a 42.63% increase.
- India's palm oil imports in January dropped to a near 14-year low due to higher soyoil imports driven by negative refining margins for palm oil. Palm oil imports in January fell 45% from December to 275,241 metric tons, the lowest since March 2011, the Solvent Extractors' Association of India (SEA) said.

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

Forthcoming Events

Board Meetings as on 13/02/2025

Hindalco Industries Limited	Financial Results
Mahindra & Mahindra Financial Services Limited	Fund Raising
Mahindra Lifespace Developers Limited	Fund Raising
Manappuram Finance Limited	Financial Results/Dividend/Fund Raising
Afcons Infrastructure Limited	Financial Results
Aksh Optifibre Limited	Financial Results
Allcargo Logistics Limited	Financial Results
Anupam Rasayan India Limited	Financial Results
Asian Hotels (North) Limited	Financial Results
Bal Pharma Limited	Financial Results/Fund Raising
Ballarpur Industries Limited	Financial Results/Fund Raising
Bartronics India Limited	Financial Results
BF Utilities Limited	Financial Results
Bharat Rasayan Limited	Financial Results
Carborundum Universal Limited	Financial Results/Dividend
Cheviot Company Limited	Financial Results
Deepak Nitrite Limited	Financial Results
Godfrey Phillips India Limited	Financial Results
Grindwell Norton Limited	Financial Results
GRM Overseas Limited	Financial Results
Gujarat Apollo Industries Limited	Financial Results
Gujarat Pipavav Port Limited	Financial Results
Harrisons Malayalam Limited	Financial Results
Harsha Engineers International Limited	Financial Results
Hindprakash Industries Limited	Financial Results

Hindustan Construction Company Limited	Financial Results
IL&FS Investment Managers Limited	Financial Results
India Nippon Electricals Limited	Financial Results/Dividend
India Tourism Development Corporation Limited	Financial Results
IPCA Laboratories Limited	Financial Results
ITI Limited	Financial Results
Jaiprakash Associates Limited	Financial Results
Jayshree Tea & Industries Limited	Financial Results
Kalpataru Projects International Limited	Financial Results
Kanoria Chemicals & Industries Limited	Financial Results
KNR Constructions Limited	Financial Results
Laxmi Dental Limited	Financial Results
Lumax Auto Technologies Limited	Financial Results
Lux Industries Limited	Financial Results
Mangalam Drugs And Organics Limited	Financial Results
Mcleod Russel India Limited	Financial Results
MMTC Limited	Financial Results
Nazara Technologies Limited	Financial Results
Power Finance Corporation Limited	Financial Results
Quadrant Future Tek Limited	Financial Results
Radiant Cash Management Services Limited	Financial Results
Raj Television Network Limited	Financial Results
Reliance Infrastructure Limited	Financial Results
Sakthi Sugars Limited	Financial Results
Senco Gold Limited	Financial Results
SJVN Limited	Financial Results/Dividend
Supreme Engineering Limited	Financial Results
Tamil Nadu Newsprint & Papers Limited	Financial Results
The Sandesh Limited	Financial Results/Dividend
TITAGARH RAIL SYSTEMS LIMITED	Financial Results
TruCap Finance Limited	Financial Results
TVS Electronics Limited	Financial Results
United Breweries Limited	Financial Results
Venus Pipes & Tubes Limited	Financial Results
ZUARI INDUSTRIES LIMITED	Financial Results

(Source: NSE)

Corporate Actions as on 13/02/2025

Eris Lifesciences Limited	Interim Dividend - Rs 7.35 Per Share
NHPC Limited	Interim Dividend - Rs 1.4 Per Share
Nxt-Infra Trust	Distribution - Rs 3.386 Per Unit Comprises Of Rs 1.462 Per Unit In The Form Of Interest/ Rs 1.924 Per Unit In The Form Of Return Of Capital
Page Industries Limited	Interim Dividend - Rs 150 Per Share
Veedol Corporation Limited	Interim Dividend - Rs 12 Per Share

(Source: NSE)

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