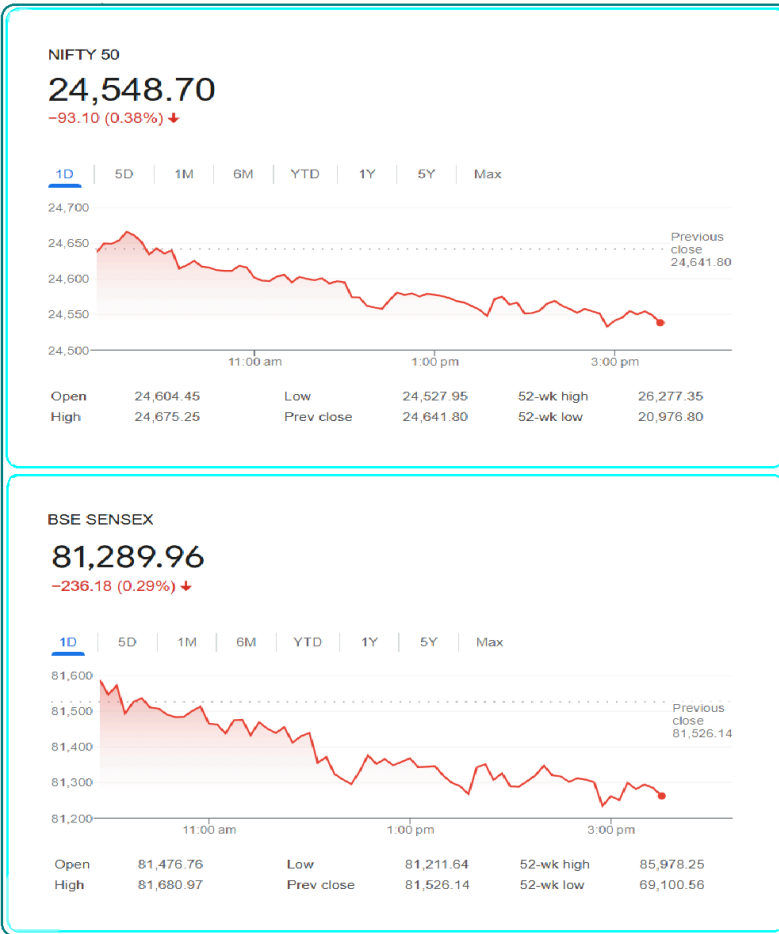


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24548.70	24641.80	<b>-0.38%</b>
<b>S&amp;P BSE SENSEX</b>	81289.96	81526.14	<b>-0.29%</b>
<b>NIFTY MID100</b>	59021.70	59292.95	<b>-0.46%</b>
<b>NIFTY SML100</b>	19466.55	19657.35	<b>-0.97%</b>

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

## Sectoral Indices

Indices	Close	Previous	Change(%)
<b>NIFTY BANK</b>	53216.45	53391.35	<b>-0.33%</b>

## Market Wrap Up

- The domestic equity benchmarks ended with modest losses. After hitting the day's high of 24,675.25 in early trade, the Nifty continued to extend losses as the session progressed to end below the 24,550 mark. Trading was volatile due to the weekly F&O series expiry today.
- The S&P BSE Sensex declined 236.18 points or 0.29% to 81,289.96. The Nifty 50 index fell 93.10 points or 0.38% to 24,548.70.
- The S&P BSE Mid-Cap index fell 0.56% and the S&P BSE Small-Cap index slipped 1%.
- Among the sectoral indices, the Nifty IT index (up 0.77%), the Nifty Metal index (up 0.25%) and the Nifty Financial Services index (down 0.31%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 2.29%), the Nifty FMCG index (down 1.09%) and the Nifty Oil & Gas index (down 0.91%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **December** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **2906** contracts at the end of the day.
- **Long** position build up for the **December** series has been witnessed in **BHARTIARTL, INFY, COFORGE, MARICO**.
- **Short** position build up for the **December** series has been witnessed in **RELIANCE, SBIN, HEROMOTOCO**.
- **Unwinding** position for the **December** series has been witnessed in **LT, ICICIBANK, HDFCBANK, LTTS**.

(Source: Capitaline F&O)

NIFTY AUTO	23660.30	23851.85	-0.80%
NIFTY FMCG	56146.70	56766.80	-1.09%
NIFTY IT	45701.65	45350.35	0.77%
NIFTY METAL	9507.75	9483.65	0.25%
NIFTY PHARMA	22229.30	22302.60	-0.33%
NIFTY REALTY	1089.85	1094.35	-0.41%
BSE CG	72932.68	73519.41	-0.80%
BSE CD	66085.61	66494.79	-0.62%
BSE Oil & GAS	27018.26	27216.56	-0.73%
BSE POWER	7574.39	7582.37	-0.11%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39849.14	39372.23	1.21%
HANG SENG	20397.05	20155.05	1.20%
STRAITS TIMES	3809.27	3792.82	0.43%
SHANGHAI	3461.50	3432.49	0.85%
KOSPI	2482.12	2442.51	1.62%
JAKARTA	7394.24	7464.75	-0.94%
TAIWAN	23046.80	22903.63	0.63%
KLSE COMPOSITE	1602.08	1603.20	-0.07%
ALL ORDINARIES	8586.90	8610.40	-0.27%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	106112.97	97652.67
NSE F&O	34911266.65	15358186.36

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	3560.01

(Source: [NSE](#))

## Corporate News

- **Adani Green Energy** said its arm has commissioned a 250 MW solar power project at Badi Sid in Jodhpur district, Rajasthan. With the commissioning of this plant, AGEL's total operational renewable generation capacity has increased to 11,434 MW.
- The **Shriram** group firm offloaded a 84.44% stake in **Shriram Housing Finance Limited**, with Warburg Pincus affiliate Mango Crest Investment picking it up for Rs 3,929 crore.
- **Tata Consultancy Services** announced a five-year partnership with Telenor Denmark (TnDK) to deliver IT infrastructure and ITIS-managed services from its delivery center in Europe.
- **NLC India** announced the start of commercial operations for the first unit of its 3 x 660 MW Ghatampur Thermal Power Plant in Uttar Pradesh.
- **NTPC Green Energy Ltd** announced that it won a 500 MW solar power project through its subsidiary, NTPC Renewable Energy Ltd.
- **Cummins India** unveiled its advanced range of Aftermarket Solutions for back-up power gensets, construction and mining segments at the 7th edition of baumaCONEXPO India 2024.
- **Godawari Power & Ispat** signed a seven-year deal with **GAIL** for RLNG gas supply to its upcoming pellet plant.
- Gland Pharma received approval from the United States Food and Drug Administration (USFDA) for Phytonadione Injectable Emulsion USP, 10 mg/mL single dose ampules.
- **Cipla** received approval from CDSCO to distribute and market Afrezza, an inhalable insulin, in India. Developed by MannKind, Afrezza offers a non-injectable alternative for adults with type 1 and type 2 diabetes. It begins working within 12 minutes, mimicking the body's natural insulin response. Cipla aims to improve diabetes management accessibility across India with this partnership.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ADANIENT	2504.10	2457.25	1.91%
BHARTIARTL	1610.55	1586.00	1.55%
TECHM	1789.60	1762.80	1.52%
INDUSINDBK	997.95	984.85	1.33%
ADANIPORTS	1244.00	1233.80	0.83%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
NTPC	355.60	365.50	-2.71%
HINDUNILVR	2344.95	2401.35	-2.35%
HEROMOTOCO	4556.75	4650.45	-2.01%
COALINDIA	409.10	416.95	-1.88%
BPCL	302.15	307.45	-1.72%

(Source: [Moneycontrol](#))

- Acme Solar Holdings announced that it has successfully secured a 250 MW Firm & Dispatchable Renewable Energy (FDRE) project in the e-reverse auction conducted by NHPC on 10 December 2024, at a tariff of Rs 4.56 per unit.
- Shakti Pumps (India)** received letter of empanelment from Maharashtra State Electricity Distribution Company (MSEDCL) under Magel Tyala Saur Krushi Pump Scheme.

- Larsen and Toubro** said that its data centre business, L&T-Cloudfiniti, has signed its first large customer for its hyperscale data centre in Sriperumbudur, near Chennai.
- Waaree Energies's** wholly owned subsidiary, Waaree Forever Energies received a Letter of Award for the development of a 170 MW solar power plant in Madhya Pradesh from Rewa Ultra Mega Solar (RUMSL).
- The Supreme Court sought response from **Reliance Infrastructure**-owned Delhi Airport Metro Express Pvt Ltd (DAMEPL), **Axis Bank** and their managing directors as to why contempt proceedings should not be initiated against them for failing to comply with an order to return more than Rs 4,500 crore, including interest, to Delhi Metro Rail Corporation (DMRC).
- Maruti Suzuki India** plans to expand its service network from 5,240 to 8,000 touchpoints by 2030-31. This expansion aims to enhance customer experience and support increased production and sales. The company recently opened its 500th NEXA premium service touchpoint, having added 90 in 2023-24 alone.
- The National Company Law Tribunal (NCLT) in Mumbai has approved **Reliance Strategic Business Ventures Limited's** Rs 202 crore resolution plan for Karkinos Healthcare Pvt. Ltd. (KHPL), which was undergoing insolvency proceedings. The plan, approved on December 9, 2024, ensures 100% recovery for all creditor classes.

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

## Global News

- U.S. consumer price index climbed by 0.3% in November after rising by 0.2% for four straight months. The annual rate of growth by consumer prices ticked up to 2.7% in November from 2.6% in October. Core consumer prices still rose by 0.3% in November, matching the increases seen in each of the three previous months. The core consumer prices in November jumped by 3.3% compared to the same month a year ago, unchanged from October.
- U.S. government reported a \$367 billion budget deficit for November 2024, marking a 17% increase from the prior year.
- Australia's unemployment rate came in at a seasonally adjusted 3.9% in November, down from 4.1% in October. The Australian economy added 35,600 jobs last month, following the increase of 15,900 jobs in the previous month.

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

## Economic News

- Crude Oil traded at US\$ 70.33/bbl (IST 17:00).
- INR weakened to Rs. 84.86 from Rs. 84.83 against each US\$ resulting in daily change of 0.04%.
- India and Britain will resume their talks on a free trade agreement by the end of January.
- The Finance Ministry announced a significant boost in tax refunds for the financial year 2024-25, with Rs 3.08 lakh crore issued between April 1 and November 27, marking a 46.31% increase from the previous year. The Income Tax Return portal handled a record 900 filings per second, processing over 1.62 crore ITRs in a single day.
- India needs a \$2.2 trillion infrastructure investment to reach a \$7 trillion economy by 2030.
- India has extended the import management system (IMS) for certain IT products including laptops and tablets by a year till December 31.
- The Indian government has requested parliament's approval for additional spending of Rs 86,730 crore (\$10.22 billion) in the current fiscal year. Of this, Rs 44,183 crore will be net new spending, while the remainder will be covered by reshuffling existing expenses.

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

## Forthcoming Events

### Board Meetings as on 13/12/2024

Sudarshan Chemical Industries Limited	Fund Raising
Zinka Logistics Solutions Limited	Financial Results

(Source: NSE)

### Corporate Actions as on 13/12/2024

Exxaro Tiles Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Re 1/- Per Share
IRB INFRASTRUCTURE TRUST	Rights 1:19.07 @ Premium Rs 0

(Source: NSE)

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