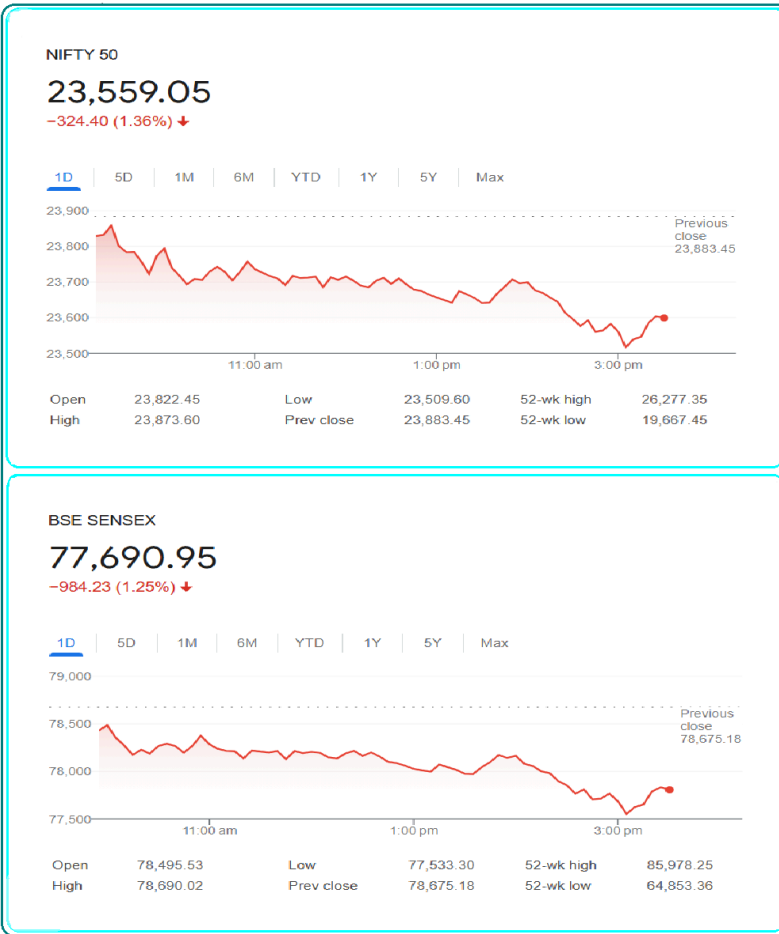


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	23559.05	23883.45	<b>-1.36%</b>
<b>S&amp;P BSE SENSEX</b>	77690.95	78675.18	<b>-1.25%</b>
<b>NIFTY MID100</b>	53800.85	55257.50	<b>-2.64%</b>
<b>NIFTY SML100</b>	17458.90	17991.60	<b>-2.96%</b>

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

## Sectoral Indices

Indices	Close	Previous	Change(%)
<b>NIFTY BANK</b>	50088.35	51157.80	<b>-2.09%</b>

## Market Wrap Up

- The key equity indices ended with significant losses, declining for the fifth day in a row. The Nifty settled a tad below the 23,600 level.
- The S&P BSE Sensex tumbled 984.23 points or 1.25% to 77,690.95. The Nifty 50 index declined 324.40 points or 1.36% to 23,559.05.
- The S&P BSE Mid-Cap index dropped 2.56% and the S&P BSE Small-Cap index tumbled 3.08%.
- Among the sectoral indices, the Nifty FMCG index (up 0.45%), Nifty IT index (up 0.56%) and the Nifty Consumer Durables (down 1.09%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Realty index (down 3.17%), the Nifty PSU Bank index (down 3.08%) and the Metal index (down 2.66%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **November** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **20172** contracts at the end of the day.
- **Long** position build up for the **November** series has been witnessed in **INFY, DABUR, COFORGE, BRITANNIA, MARICO**.
- **Short** position build up for the **November** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.
- **Unwinding** position for the **November** series has been witnessed in **ZYDUSLIFE, LTIM**.

(Source: Capitaline F&O)

NIFTY AUTO	22765.20	23269.10	-2.17%
NIFTY FMCG	56647.85	56902.55	-0.45%
NIFTY IT	42369.50	42609.55	-0.56%
NIFTY METAL	8836.75	9078.50	-2.66%
NIFTY PHARMA	21809.30	22151.60	-1.55%
NIFTY REALTY	937.25	967.95	-3.17%
BSE CG	65927.52	67767.53	-2.72%
BSE CD	60145.78	60672.55	-0.87%
BSE Oil & GAS	26327.17	26804.88	-1.78%
BSE POWER	7336.29	7508.58	-2.29%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38721.66	39376.09	-1.66%
HANG SENG	19823.45	19846.88	-0.12%
STRAITS TIMES	3720.34	3711.48	0.24%
SHANGHAI	3439.28	3421.97	0.51%
KOSPI	2417.08	2482.57	-2.64%
JAKARTA	7308.67	7321.99	-0.18%
TAIWAN	22860.23	22981.77	-0.53%
KLSE COMPOSITE	1611.50	1608.43	0.19%
ALL ORDINARIES	8450.90	8515.20	-0.76%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	101536.12	90244.39
NSE F&O	67167267.25	48437113.74

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2502.58

(Source: [NSE](#))

## Corporate News

- CESC Ltd** reported a nearly 3% rise in consolidated net profit to Rs 373 crore in the September 2024 quarter. It posted a profit of Rs 363 crore during the three months ended September 2024. Total income rose to Rs 4,770 crore from Rs 4,414 crore in the year-ago period.
- Ashok Leyland** reported a 37% year-on-year increase in net profit for Q2 FY24, reaching Rs. 770 crore, up from Rs. 561 crore in the same quarter last year. The company's profit reached Rs. 561 crore. Revenue for the July-September quarter fell 9% YoY to Rs. 8,769 crore, down from Rs. 9,638 crore in Q2 last year.
- Natco Pharma** said its consolidated net profit jumped 83% on-year to Rs 676 crore in the September 2024 quarter, aided by robust sales. The drug maker reported a net profit of Rs 369 crore in the July-September period of last fiscal. Revenue from operations rose to Rs 1,371 crore as compared with Rs 1,031 crore in the year-ago period.
- Bosch** said its consolidated net profit declined 46% on-year to Rs 536 crore in the September 2024 quarter. The company reported a net profit of Rs 1,000 crore in the July-September quarter of last fiscal. Revenue from operations increased to Rs 4,394 crore in the second quarter as compared with Rs 4,130 crore in the year-ago period.
- FSN E-Commerce Ventures** reported a net profit of Rs. 10.04 Crore for Q2 FY25, logging a 71.6% increase over the previous year. The cosmetics company reported a profit of Rs. 5.85 Crore in the same quarter previous year. On a quarterly basis, net profit increased 4.1%. FSN's consolidated revenue for the September quarter was Rs. 1,874.74 Crore, a 24.4% rise over the previous year's equivalent quarter of Rs. 1,507.02 Crore.
- Greaves Cotton** reported a consolidated net loss of Rs 14.33 crore in Q2 FY25 as against a net loss of Rs 379.59 crore posted in Q2 FY24. Income from operations fell by 3% YoY to Rs 705 crore during the quarter.
- PTC India** posted consolidated net profit jumped 15.57% to Rs 233.82 on 1.15% rise in revenue from operations to Rs 5,127.99 crore in Q2 FY25 over Q2 FY24.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BRITANNIA	5046.50	5027.55	0.38%
NTPC	381.35	380.30	0.28%
TATAMOTORS	786.25	784.85	0.18%
HINDUNILVR	2464.95	2461.50	0.14%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
HEROMOTOCO	4519.60	4724.20	-4.33%
HINDALCO	626.60	651.65	-3.84%
TATASTEEL	139.17	144.17	-3.47%
M&M	2798.95	2898.55	-3.44%
EICHERMOT	4588.70	4738.20	-3.16%

(Source: [Moneycontrol](#))

- **Power Mech Projects** reported 35.60% jump in consolidated net profit to Rs 69.51 crore in Q2 FY25 as compared with Rs 51.26 crore recorded in corresponding quarter last year. Revenue from operations increased 11.04% to Rs 1,035.49 crore during the quarter as compared with Rs 932.49 crore posted in same period last year.
- **Kalpataru Projects International** has secured new orders worth Rs 2,273 crore for its Transmission & Distribution business in India and overseas, as well as for residential building projects in India. This brings their year-to-date order inflow to approximately Rs 14,100 crore, with 56% coming from their T&D business.
- **Nazara Technologies** announced its integration with the Open Network for Digital Commerce (ONDC) to launch "gCommerce."

- **Suven Pharmaceuticals** posted consolidated net profit increased 3.34% to Rs 82.21 crore on 11.54% rise in revenue from operations to Rs 257.72 crore in Q2 FY25 over Q2 FY24.
- **Patel Engineering** reported consolidated net profit surged 150.87% to Rs 80.77 crore on 14.98% increase in total revenue from operations to Rs 1174.32 crore in Q2 September 2024 over Q2 September 2023.
- **Cupid** standalone net profit soared 96.28% to Rs 10.03 crore on 29.74% increased in total income to Rs 47.28 crore in Q2 FY25 over Q2 FY24.
- **Repc Home Finance's** standalone net profit jumped 14.69% to Rs 112.51 crore on 11.48% increase in total income to Rs 427.98 crore in Q2 FY25 over Q2 FY24.
- **Ashoka Buildcon** posted consolidated net profit surged 334.15% to Rs 462.46 crore on 15.53% jump in revenue from operations to Rs 2488.93 crore in Q2 FY25 over Q2 FY24.
- **Sula Vineyards** posted consolidated net profit fell 37.28% to Rs 14.48 crore in Q2 FY25 as against Rs 23.09 crore posted in Q2 FY24. Revenue decreased marginally to Rs 132.36 crore in the second quarter of FY25 as compared to Rs 133.69 crore recorded in the corresponding quarter previous year.
- **PNC Infratech** reported 43.57% drop in consolidated net profit to Rs 83.46 crore on 25.34% decline in revenue from operations to Rs 1,427.05 crore in Q2 FY25 over Q2 FY24.
- **Man Infraconstruction** reported 36.05% decline in consolidated net profit to Rs 44.54 crore in Q2 FY25 as against Rs 69.65 crore in Q2 FY24. Revenue increased by 6.98% YoY to Rs 230.32 crore in the quarter ended 30 september 2024.

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

## Global News

- Germany's current account surplus widened to EUR 22.6 billion in September 2024 from EUR 17.1 billion in the previous month.
- French unemployment rate rose to 7.4% in the third quarter of 2024, edging up from 7.3% in the previous period.
- Japan producer prices increased by 3.4% yoy in October 2024, steeper than an upwardly revised 3.1% growth in the previous month. Monthly, producer prices rose by 0.2%, beating consensus of a flat reading and following an upwardly revised 0.3% gain in September.

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

## Economic News

- Crude Oil traded at US\$ 68.67/bbl (IST 17:00).
- INR strengthened to Rs. 84.38 from Rs. 84.40 against each US\$ resulting in daily change of 0.02%.
- Passenger vehicle wholesales saw a slight year-on-year increase in October, rising to 393,238 units, compared to 389,714 units in October 2023, according to SIAM. Meanwhile, total two-wheeler sales surged by 14%, reaching 2,164,276 units last month, up from 1,895,799 units in the same period last year.
- India has imposed an anti-dumping duty of up to USD 557 per tonne on a chemical used mainly in the adhesive industry from China, Korea, and Thailand for five years to guard domestic players from cheap imports from these nations. The duty was imposed as the chemical - Epichlorohydrin - was exported to India from these countries at below-normal prices.
- India's edible oil imports declined by 3.09% to 159.6 lakh tonnes during the 2023-24 oil marketing year due to higher domestic oilseeds production and reduced demand amid rising prices, according to industry body SEA. The country, which is the world's largest importer of edible oils, had imported 164.7 lakh tonnes in the previous oil year (November-October).

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

## Forthcoming Events

### Board Meetings as on 14/11/2024

Hero MotoCorp Limited	Financial Results
Grasim Industries Limited	Financial Results
Hindustan Aeronautics Limited	Financial Results
Hinduja Global Solutions Limited	Financial Results
Honda India Power Products Limited	Financial Results
Asian Granito India Limited	Financial Results
Avanti Feeds Limited	Financial Results
Bajaj Healthcare Limited	Financial Results
Bajel Projects Limited	Financial Results
Balaji Amines Limited	Financial Results
Balaji Telefilms Limited	Financial Results
Ballarpur Industries Limited	Financial Results
Bharat Dynamics Limited	Financial Results
Bharat Forge Limited	Financial Results
Bharat Gears Limited	Financial Results
Bodal Chemicals Limited	Financial Results
Bombay Burmah Trading Corporation Limited	Financial Results
Capacit'e Infraprojects Limited	Financial Results
Crompton Greaves Consumer Electricals Limited	Financial Results
Delhivery Limited	Financial Results
Dhani Services Limited	Financial Results
Digidrive Distributors Limited	Financial Results
Easy Trip Planners Limited	Financial Results
EID Parry India Limited	Financial Results
Fedders Electric and Engineering Limited	Financial Results
Federal-Mogul Goetze (India) Limited.	Financial Results
Glenmark Pharmaceuticals Limited	Financial Results
GVK Power & Infrastructure Limited	Financial Results
Heubach Colorants India Limited	Financial Results
Hindustan Oil Exploration Company Limited	Financial Results
HMT Limited	Financial Results
Honasa Consumer Limited	Financial Results
Hubtown Limited	Financial Results
Igarashi Motors India Limited	Financial Results
India Tourism Development Corporation Limited	Financial Results
IOL Chemicals and Pharmaceuticals Limited	Financial Results

IPCA Laboratories Limited	Financial Results/Dividend
Jamna Auto Industries Limited	Financial Results/Dividend
Jayshree Tea & Industries Limited	Financial Results
Kirloskar Industries Limited	Financial Results
Kohinoor Foods Limited	Financial Results
Kokuyo Camlin Limited	Financial Results
La Opala RG Limited	Financial Results
Lemon Tree Hotels Limited	Financial Results
Lovable Lingerie Limited	Financial Results
Muthoot Finance Limited	Financial Results
Nazara Technologies Limited	Financial Results
Nectar Lifesciences Limited	Financial Results
Peninsula Land Limited	Financial Results
PTC Industries Limited	Financial Results
Rajesh Exports Limited	Financial Results
Royal Orchid Hotels Limited	Financial Results
S H Kelkar and Company Limited	Financial Results
Sadbhav Engineering Limited	Financial Results
Schneider Electric Infrastructure Limited	Financial Results
Shriram Properties Limited	Financial Results
Sobha Limited	Financial Results/Fund Raising
Som Distilleries & Breweries Limited	Financial Results
Speciality Restaurants Limited	Financial Results
Sreeleathers Limited	Financial Results
Talbros Automotive Components Limited	Financial Results/Dividend
Tasty Bite Eatables Limited	Financial Results
Tega Industries Limited	Financial Results
Udayshivakumar Infra Limited	Financial Results

(Source: NSE)

## Corporate Actions as on 14/11/2024

Akzo Nobel India Limited	Interim Dividend - Rs 70 Per Share
Amara Raja Energy & Mobility Limited	Interim Dividend - Rs 5.30 Per Share
Aptus Value Housing Finance India Limited	Interim Dividend - Rs 2 Per Share
Astral Limited	Interim Dividend - Rs 1.50 Per Share
Container Corporation of India Limited	Interim Dividend - Rs 3.25 Per Share
Indian Metals & Ferro Alloys Limited	Interim Dividend - Rs 10 Per Share
Indian Railway Catering And Tourism Corporation Limited	Interim Dividend - Rs 4 Per Share
Oil India Limited	Interim Dividend - Rs 3 Per Share
Page Industries Limited	Interim Dividend - Rs 250 Per Share
Power Grid Corporation of India Limited	Interim Dividend - Rs 4.50 Per Share
RITES Limited	Interim Dividend - Rs 1.75 Per Share

(Source: NSE)

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