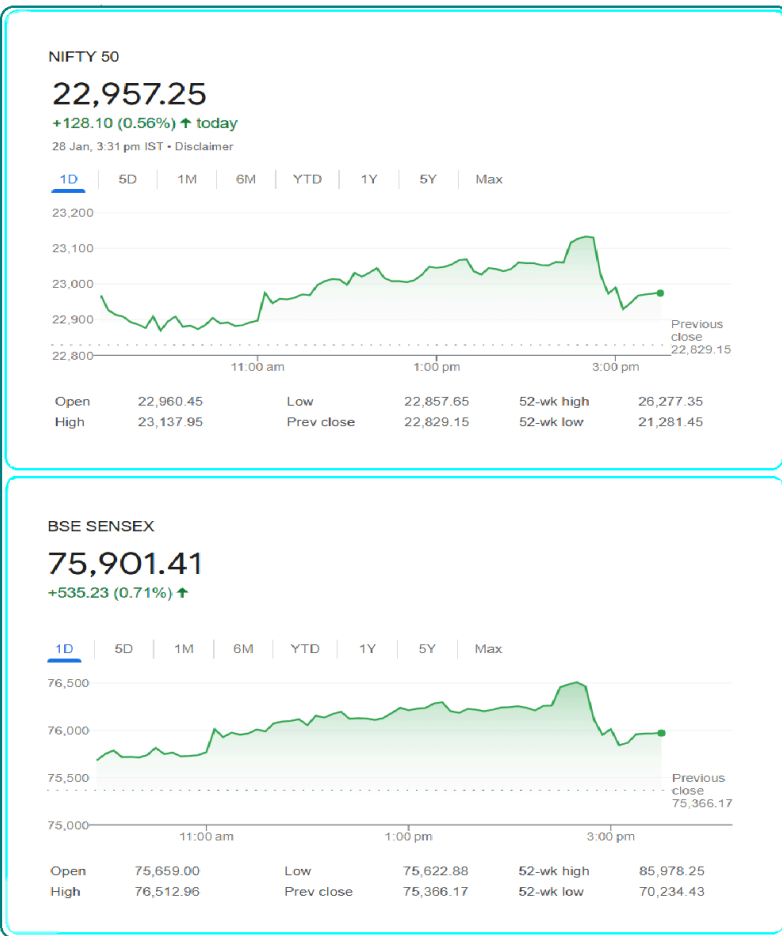


8

Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22957.25	22829.15	0.56%
S&P BSE SENSEX	75901.41	75366.17	0.71%
NIFTY MID100	51529.45	51795.90	-0.51%
NIFTY SML100	16008.50	16304.25	-1.81%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	48866.85	48064.65	1.67%

Market Wrap Up

- Key equity benchmarks posted significant gains, ending a two-day losing streak, after the Reserve Bank of India announced measures to enhance liquidity in the banking system. The Nifty closed above the 22,950 mark.
- The S&P BSE Sensex surged 535.24 points or 0.71% to 75,901.41. The Nifty 50 index advanced 128.10 points or 0.56% to 22,957.25.
- The S&P BSE Mid-Cap index shed 0.61% and the S&P BSE Small-Cap index slipped 1.77%.
- Among the sectoral indices, the Nifty Realty index (up 2.17%), Nifty Financial Services index (up 1.89%) and the Nifty PSU Bank index (up 1.71%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Pharma index (down 2.33%), the Nifty Healthcare index (down 2.12%) and the Nifty Media index (down 1.25%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **February** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **137397** contracts at the end of the day.
- **Long** position build up for the **February** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, BAJFINANCE**.
- **Short** position build up for the **February** series has been witnessed in **LT, TCS, NTPC, SYNGENE**.

(Source: Capitaline F&O)

NIFTY AUTO	22264.15	21970.45	1.34%
NIFTY FMCG	55441.95	55654.50	-0.38%
NIFTY IT	41820.65	42060.70	-0.57%
NIFTY METAL	8157.45	8189.80	-0.40%
NIFTY PHARMA	20796.60	21292.30	-2.33%
NIFTY REALTY	862.90	844.60	2.17%
BSE CG	60136.27	61101.85	-1.58%
BSE CD	56404.66	56831.85	-0.75%
BSE Oil & GAS	24376.69	24572.67	-0.80%
BSE POWER	6219.71	6312.26	-1.47%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39016.87	39565.80	-1.39%
HANG SENG	20225.11	20197.77	0.14%
STRAITS TIMES	3801.07	3796.71	0.11%
SHANGHAI	CLOSED	3250.60	-
KOSPI	CLOSED	2536.80	-
JAKARTA	CLOSED	CLOSED	-
TAIWAN	CLOSED	CLOSED	-
KLSE COMPOSITE	1552.69	1558.97	-0.40%
ALL ORDINARIES	8644.50	8660.40	-0.18%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	115503.17	95150.83
NSE F&O	13864096.62	11309459.38

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4920.69

(Source: [NSE](#))

Corporate News

- **Tata Steel** reported a 43.41% decline in consolidated net profit to Rs 295.49 crore in Q3 FY25 compared with Rs 522.14 crore in Q3 FY24. Revenue from operations fell 3.01% YoY to Rs 53,648.30 crore in Q3 FY25.
- **Coal India** reported a 17.04% decrease in consolidated net profit to Rs 8,505.57 crore in Q3 FY25 from Rs 10,253.48 crore in Q3 FY24. Revenue from operations fell 1.03% to Rs 35,779.78 crore in the third quarter of FY25 from Rs 36,153.97 crore recorded in the same period last year.
- **Bajaj Housing Finance** reported a 25.41% rise in standalone net profit to Rs 548.02 crore on a 25.82% increase in revenue from operations to Rs 2,448.98 crore in Q3 FY25, compared with Q3 FY24. NII for Q3 FY25 stood at Rs 806 crore, up 24.96% as against Rs 645 crore in Q3 FY24.
- **Federal Bank** posted standalone net profit decreased 5.1% to Rs 955.44 crore in Q3 FY25 from Rs 1,006.74 crore posted in same quarter last year. Total income increased 38.13% year on year (YoY) to Rs 7,724.90 crore in the December 2024 quarter. NII increased by 16.27% YoY to Rs 7,091 crore in during the quarter.
- **Union Bank of India** posted standalone net profit jumped 28.23% to Rs 4,603.63 crore on 7.67% increase in total income to Rs 31,374.5 crore in Q3 FY25 over Q3 FY24. NII increased marginally to Rs 9,240 crore in Q3 FY25 as against Rs 9,168 crore in Q3 FY24.
- **TVS Motor Company** reported a steady performance for the third quarter of FY25, with its net profit rising 4.2% on-year to Rs 618 crore during the quarter. Revenue from operations increased by 10% year-on-year to Rs 9,097 crore. This was a rise from Rs 8,245 crore reported in the same quarter of the previous year.
- **Emami** posted consolidated net sales at Rs 1,049.48 crore in December 2024 up 5.34% from Rs. 996.32 crore in December 2023. Net profit at Rs. 278.99 crore in December 2024 up 7.96% from Rs. 258.41 crore in December 2023.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BAJFINANCE	7606.60	7295.45	4.26%
AXISBANK	983.80	948.10	3.77%
SHRIRAMFIN	530.10	511.65	3.61%
BAJFINANCE	1768.95	1711.60	3.35%
HDFCBANK	1670.40	1629.80	2.49%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SUNPHARMA	1705.50	1786.85	-4.55%
BRITANNIA	5060.75	5176.25	-2.23%
HINDALCO	573.85	586.90	-2.22%
GRASIM	2411.30	2458.05	-1.90%
BEL	258.25	262.95	-1.79%

(Source: [Moneycontrol](#))

- **Godrej Consumer Products** posted consolidated net sales at Rs 3,768.43 crore in December 2024 up 2.97% from Rs. 3,659.64 crore in December 2023. Net profit at Rs. 498.31 crore in December 2024 down 14.24% from Rs. 581.06 crore in December 2023.
- **Indian Oil Corporation** posted consolidated net sales at Rs 194,014.49 crore in December 2024 down 2.95% from Rs. 199,905.65 crore in December 2023. Net profit at Rs. 2,115.29 crore in December 2024 down 76.57% from Rs. 9,029.56 crore in December 2023.
- **Bharat Petroleum Corporation** posted consolidated net sales at Rs 113,165.87 crore in December 2024 down 2.02% from Rs. 115,499.14 crore in December 2023. Net profit at Rs. 3,805.94 crore in December 2024 up 19.63% from Rs. 3,181.42 crore in December 2023.
- **Petronet LNG** posted consolidated net sales at Rs 12,226.86 crore in December 2024 down 17.09% from Rs. 14,747.21 crore in December 2023. Net profit at Rs. 901.70 crore in December 2024 down 25.66% from Rs. 1,212.98 crore in December 2023.
- **Tata Communications** posted consolidated net sales at Rs 5,798.07 crore in December 2024 up 2.93% from Rs. 5,633.26 crore in December 2023. Net profit at Rs. 235.96 crore in December 2024 up 426.58% from Rs. 44.81 crore in December 2023.
- **New Delhi Television** posted consolidated net sales at Rs 132.74 crore in December 2024 up 35.52% from Rs. 97.95 crore in December 2023. Net loss at Rs. 55.69 crore in December 2024 down 483.14% from Rs. 9.55 crore in December 2023.
- **LT Foods** posted consolidated net profit declined 4.76% to Rs 145.38 crore in Q3 FY25 compared with Rs 152.64 crore in Q3 FY24. Revenue from operations increased 17.15% to Rs 2,274.81 crore in Q3 FY25 compared with Rs 1,941.72 crore in Q3 FY24.
- **Laurus Labs** posted consolidated net sales at Rs 1,415.05 crore in December 2024 up 18.42% from Rs. 1,194.92 crore in December 2023. Net profit at Rs. 92.30 crore in December 2024 up 298.88% from Rs. 23.14 crore in December 2023.
- **Adani Total Gas** posted standalone net profit fell 16.74% to Rs 143.44 crore in Q3 FY25 as against Rs 172.28 crore posted in Q3 FY24. Revenue from operations increased by 12.40% YoY to Rs 1,397.35 crore for the quarter ending 31 December 2024, driven by higher volume.
- **Adani Energy Solutions** posted consolidated net sales at Rs 5,830.26 crore in December 2024 up 27.78% from Rs. 4,562.73 crore in December 2023. Net profit at Rs. 561.78 crore in December 2024 up 72.91% from Rs. 324.90 crore in December 2023.
- **Suven Life Sciences** posted consolidated net sales at Rs 1.61 crore in December 2024 down 34.31% from Rs. 2.45 crore in December 2023. Net loss at Rs. 39.12 crore in December 2024 up 6.34% from Rs. 41.76 crore in December 2023.
- **Granules India** posted consolidated net sales at Rs 1,137.70 crore in December 2024 down 1.55% from Rs. 1,155.58 crore in December 2023. Net profit at Rs. 117.60 crore in December 2024 down 6.41% from Rs. 125.65 crore in December 2023.
- **Oriental Rail Infrastructure's** wholly owned subsidiary, Oriental Foundry received an order worth Rs 575.21 crore from

Indian Railways to manufacture and supply wagons.

- **Azad Engineering** said that it has secured a purchase order from Bharat Heavy Electrical (BHEL) for the supply of advanced, high-complex rotating airfoils for supercritical turbines.
- **Transformers and Rectifiers (India)** said that it has bagged supply orders worth Rs 362 crore from Power Grid Corporation of India Limited and six other entities.

- **Polycab India** posted consolidated net sales at Rs 5,226.06 crore in December 2024 up 20.4% from Rs. 4,340.47 crore in December 2023. Net profit at Rs. 457.56 crore in December 2024 up 10.83% from Rs. 412.85 crore in December 2023.
- **Piramal Enterprises** posted consolidated net sales at Rs 2,448.58 crore in December 2024 down 1.09% from Rs. 2,475.65 crore in December 2023. Net profit at Rs. 38.56 crore in December 2024 up 101.62% from Rs. 2,377.59 crore in December 2023.

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

Global News

- U.S. new home sales shot up by 3.6% to an annual rate of 698,000 in December after soaring by 9.6% to an upwardly revised value of 674,000 in November.
- U.S. building permits decreased by 0.7% to a seasonally adjusted annualized rate of 1.482 million in December of 2024.
- France's consumer confidence indicator rose to 92 in January 2025, up from 89 in December.

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

Economic News

- Crude Oil traded at US\$ 73.69/bbl (IST 17:00).
- INR weakened to Rs. 86.53 from Rs. 86.33 against each US\$ resulting in daily change of 0.23%.
- The Reserve Bank of India announced several measures that are set to inject over INR 1 trillion liquidity into the banking system. The central bank said it will purchase government securities worth INR 600 billion through open market operations purchase auctions. These will be held in three tranches of INR 200 billion each on January 30, February 13 and February 20. The bank also revealed a 56-day variable rate repo auction for INR 500 billion to be held on February 7. The RBI also announced USD/INR Buy/Sell swap auction of USD 5 billion for a tenor of six months. This will be held on January 31. These measures combined are set to infuse INR 1.5 trillion liquidity into the banking system.

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

Forthcoming Events

Board Meetings as on 29/01/2025

Maruti Suzuki India Limited	Financial Results
Tata Motors Limited	Financial Results
Bajaj Finance Limited	Financial Results
Computer Age Management Services Limited	Financial Results/Dividend
Ambuja Cements Limited	Financial Results
Arvind SmartSpaces Limited	Financial Results
3i Infotech Limited	Financial Results
Aarti Drugs Limited	Financial Results/Dividend
Acme Solar Holdings Limited	Financial Results
Adani Power Limited	Financial Results
Allied Blenders and Distillers Limited	Financial Results
Archidply Industries Limited	Financial Results
Bansal Wire Industries Limited	Financial Results
Blue Dart Express Limited	Financial Results
Blue Jet Healthcare Limited	Financial Results
Blue Star Limited	Financial Results
Brigade Enterprises Limited	Financial Results
Capital Small Finance Bank Limited	Financial Results
Cartrade Tech Limited	Financial Results
Chalet Hotels Limited	Financial Results
Craftsman Automation Limited	Financial Results
Deepak Fertilizers and Petrochemicals Corporation Limited	Financial Results
eClerx Services Limited	Financial Results
Fino Payments Bank Limited	Financial Results
GMR Power and Urban Infra Limited	Financial Results
Gujarat Fluorochemicals Limited	Financial Results
Hindustan Motors Limited	Financial Results
Hitachi Energy India Limited	Financial Results
IFB Agro Industries Limited	Financial Results
IFCI Limited	Fund Raising
Indian Bank	Financial Results
JBM Auto Limited	Financial Results
Jindal Stainless Limited	Financial Results/Dividend
JK Paper Limited	Financial Results
Jupiter Wagons Limited	Financial Results
KPIT Technologies Limited	Financial Results/Dividend

MAS Financial Services Limited	Financial Results/Dividend
Oil Country Tubular Limited	Financial Results
Olectra Greentech Limited	Financial Results
Orient Electric Limited	Financial Results/Dividend
Qess Corp Limited	Financial Results/Dividend
Radico Khaitan Limited	Financial Results
Raymond Limited	Financial Results
Restaurant Brands Asia Limited	Financial Results
Samhi Hotels Limited	Financial Results
SMC Global Securities Limited	Financial Results/Dividend
SRF Limited	Financial Results/Dividend
Sundaram Finance Holdings Limited	Financial Results/Dividend
Tamilnad Mercantile Bank Limited	Financial Results
Teamlease Services Limited	Financial Results
Usha Martin Limited	Financial Results
Voltas Limited	Financial Results
WESTLIFE FOODWORLD LIMITED	Financial Results

(Source: NSE)

Corporate Actions as on 29/01/2025

Bharat Petroleum Corporation Limited	Interim Dividend - Rs 5 Per Share
Mindspace Business Parks REIT	Distribution - Rs 5.32 Per Unit Consisting Of Dividend - Rs 3.20 Per Unit/ Interest - Re 0.22 Per Unit/ Repayment Of Spv Debt - Rs 1.88 Per Unit /Other Income - Re 0.02 Per Unit
MPS Limited	Interim Dividend - Rs 33 Per Share

(Source: NSE)

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Saltlake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : research@shriraminsight.com | www.shriraminsight.com |