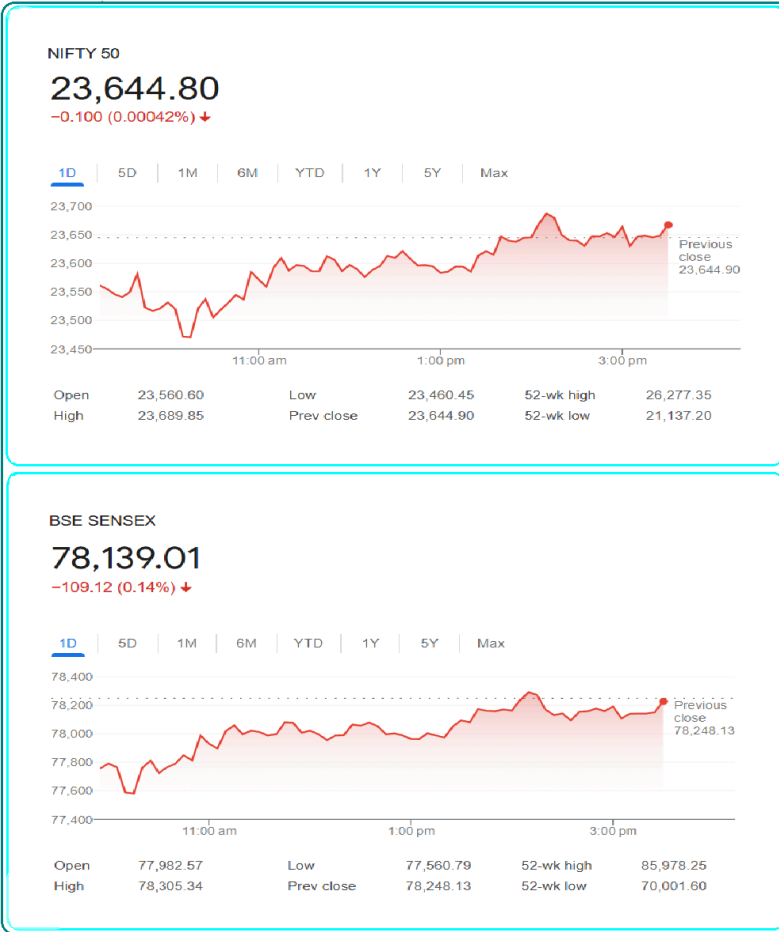


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23644.80	23644.90	0.00%
S&P BSE SENSEX	78139.01	78248.13	-0.14%
NIFTY MID100	57199.45	57189.75	0.02%
NIFTY SML100	18769.20	18639.95	0.69%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	50860.20	50952.75	-0.18%

Market Wrap Up

- The domestic equity indices ended on a flat note, losing for the second consecutive day in a row. The Nifty settled below the 23,650 mark after hitting the day's high of 23,689.85 in mid-afternoon trade.
- The S&P BSE Sensex, declined 109.12 points or 0.14% to 78,139.01. The Nifty 50 index shed 0.10 points or 0% to 23,644.80.
- In the past one year, the Sensex increased 8.17%, the Nifty jumped 8.8% and the Bank Nifty gained 5.32%.
- The S&P BSE Mid-Cap index rose 0.13% and the S&P BSE Small-Cap index advanced 0.71%.
- Among the sectoral indices, the Nifty Oil & Gas index (up 1.06%), the Nifty Pharma index (up 0.74%) and the Nifty PSU bank index (up 0.73%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 1.44%), the Nifty Realty index (down 0.24%) and the Nifty Financial Services Index (down 0.22%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **January** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **44787** contracts at the end of the day.
- **Long** position build up for the **January** series has been witnessed in **RELIANCE, LT, BHARTIARTL, CESC**.
- **Short** position build up for the **January** series has been witnessed in **ICICIBANK, HDFCBANK, INFY, LTTS**.
- **Unwinding** position for the **January** series has been witnessed in **SBIN, BAJAJFINSV, TATASTEEL, VEDL**.

(Source: Capitaline F&O)

NIFTY AUTO	22834.00	22768.25	0.29%
NIFTY FMCG	56799.65	56618.40	0.32%
NIFTY IT	43337.80	43971.40	-1.44%
NIFTY METAL	8649.90	8609.85	0.47%
NIFTY PHARMA	23412.25	23241.15	0.74%
NIFTY REALTY	1052.35	1054.85	-0.24%
BSE CG	67779.50	66904.27	1.31%
BSE CD	64436.34	64109.83	0.51%
BSE Oil & GAS	26064.59	25797.08	1.04%
BSE POWER	6965.68	6932.94	0.47%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	CLOSED	39894.54	-
HANG SENG	20059.95	20041.42	0.09%
STRAITS TIMES	3787.60	3795.73	-0.21%
SHANGHAI	3351.76	3407.33	-1.63%
KOSPI	CLOSED	2399.49	-
JAKARTA	CLOSED	7079.90	-
TAIWAN	23035.10	23190.20	-0.67%
KLSE COMPOSITE	1642.33	1637.68	0.28%
ALL ORDINARIES	8420.50	8496.00	-0.89%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	83252.78	140017.26
NSE F&O	25261948.05	21490980.97

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4645.22

(Source: [NSE](#))

Corporate News

- Reliance Industries Ltd** is seeking a premium of at least USD 3.5 per barrel over an international benchmark for crude oil it produces for eastern offshore KG-D6 block, according to the tender the firm put out on Monday. Reliance and its partner BP of the UK sought bids from domestic refiners for sale of 17,600 barrels (2,800 kilolitres) of crude oil every month from April 2025 to February 2026.
- Hindustan Unilever** is streamlining its distribution process by directly supplying products to kirana stores in Mumbai, with the aim to reduce supply time to under 24 hours. Distributors will manage orders and payments, while HUL handles logistics. The initiative will expand to Delhi and other metros, enhancing service efficiency.
- Adani Enterprises Ltd** is set to exit its 25-year-old joint venture with Wilmar International in a deal worth around \$2 billion. The funds will be used by AEL for its core infrastructure platforms such as energy, utilities, transport and logistics.
- Waaree Renewable Technologies Ltd** has secured its largest-ever order for a 2 GW solar project from Sunbreeze Renewables Nine Pvt Ltd, a Special Purpose Vehicle (SPV) of Jindal Renewables.
- Lupin Ltd** has acquired the anti-diabetic medicine Huminsulin in India from Eli Lilly to expand its diabetes portfolio. This move aims to provide high-quality, affordable healthcare for diabetes patients. Huminsulin is used for treating Type 1 and Type 2 diabetes to improve blood sugar control.
- The Ministry of Defence (MoD) announced the signing of two contracts for Rs. 2,867 Crore to upgrade the operating capabilities of Indian submarines. The first contract, worth Rs. 1,990 Crore, was signed with **Mazagon Dock Shipbuilders Ltd**, Mumbai, for the fabrication of an air-independent propulsion (AIP) plug using DRDO technology. The second deal, costing Rs. 877 Crore, was inked with Naval Group, France, for integrating an electronic heavyweight torpedo (EHWT) system developed in partnership with DRDO into the Kalvari class submarines.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BEL	293.15	284.90	2.90%
ONGC	239.25	232.65	2.84%
KOTAKBANK	1786.05	1740.70	2.61%
TRENT	7123.35	6954.35	2.43%
COALINDIA	384.15	377.90	1.65%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ADANIENT	2528.65	2592.35	-2.46%
TECHM	1706.20	1740.85	-1.99%
TCS	4094.80	4158.80	-1.54%
INFY	1880.00	1906.00	-1.36%
SHRIRAMFIN	2889.15	2919.00	-1.02%

(Source: [Moneycontrol](#))

- **KPI Green Energy** has obtained approvals from the Chief Electrical Inspector (CEIG) for 28.28 MW of solar power projects under its Captive Power Producer (CPP) segment.
- **Rail Vikas Nigam** emerged as 'lowest bidder' (L1) from East Coast Railway for Koraput-Singapur road doubling project worth Rs 404.40 crore.
- **Venus Remedies** received good manufacturing practice (GMP) certification from Ministry of Health of Moldova for the company's antibiotic -Carbapenem facility.
- **Jubilant Ingrevia's** wholly owned subsidiary, Jubilant Infrastructure (JIL) board has approved to purchase 6.67% stake in Forum I Aviation Private (FAPL) from Hero Fincorp & Sunil Kant Munjal.
- **CESC** announced that its subsidiary, Purvah Green Power received a letter of award (LoA) from CESC's another subsidiary, Noida Power Company (NPCL) for wind-solar hybrid power projects.
- **Hindalco Industries** said that it has received the allocation of the Meenakshi Coal Mine in Odisha through a vesting order by the Ministry of Coal.

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

Global News

- China's NBS manufacturing PMI dropped to 50.1 in December from 50.3 in the previous month. The non-manufacturing PMI advanced more-than-expected to 52.2 from 50.0 a month ago. The official composite PMI posted 52.2, up from 50.8 in November.
- U.S. pending home sales index shot up by 2.2% to 79.0 in November after jumping by 1.8% to 77.3 in October.
- U.S. MNI Indicators said its Chicago business barometer slid to 36.9 in December from 40.2 in November.

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

Economic News

- Crude Oil traded at US\$ 71.48/bbl (IST 17:00).
- INR weakened to Rs. 85.61 from Rs. 85.53 against each US\$ resulting in daily change of 0.09%.
- India's fiscal deficit for April to November, or the first eight months of this fiscal year, was at 8.47 lakh crore rupees, equivalent to 52.5% of annual estimates, widening from the previous year's 50.7%. The government aims to narrow the fiscal gap to 4.9% of GDP in this financial year from 5.6% a year earlier.
- The government has extended the minimum export price (MEP) of \$2,000 per tonne on natural honey until December 31, 2025.
- India has begun a countervailing duty investigation on increased imports of Calcium Carbonate Filler Masterbatch from Vietnam, following a complaint by domestic manufacturers. The probe aims to determine the impact of subsidized imports and may result in duties to protect Indian industries.
- Non-bank financial companies (NBFCs) saw their loan disbursements drop nearly 13% on-year at the end of the September 2024 quarter, led by a 23% decline in urban sanctions.

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

Forthcoming Events

Corporate Actions as on 01/01/2025

SURYA ROSHNI LTD.

Bonus issue 1:1

(Source: NSE)

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