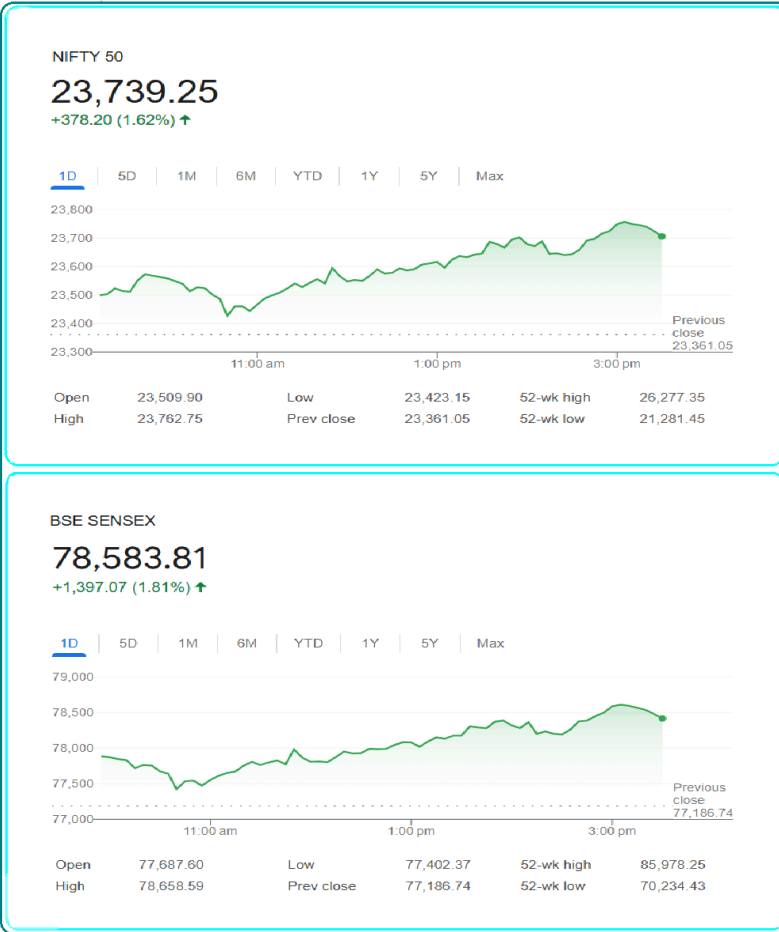


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	23739.25	23361.05	<b>1.62%</b>
<b>S&amp;P BSE SENSEX</b>	78583.81	77186.74	<b>1.81%</b>
<b>NIFTY MID100</b>	53813.80	52988.80	<b>1.56%</b>
<b>NIFTY SML100</b>	16798.50	16617.60	<b>1.09%</b>

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

## Sectoral Indices

Indices	Close	Previous	Change(%)
<b>NIFTY BANK</b>	50157.95	49210.55	<b>1.93%</b>

## Market Wrap Up

- The key equity indices ended with strong gains, fueled by the U.S. decision to suspend its planned tariffs on Canada and Mexico, providing a temporary reprieve from escalating trade tensions. This move was viewed as a positive development in alleviating trade concerns and boosting market sentiment. The focus has now shifted to the upcoming RBI monetary policy decision on February 7. The Nifty settled above the 23,700 level.
- The S&P BSE Sensex soared 1,397.07 points or 1.81% to 78,583.81. The Nifty 50 index rallied 378.20 points or 1.62% to 23,739.25.
- The S&P BSE Mid-Cap index rose 1.35% and the S&P BSE Small-Cap index added 1.20%.
- Among the sectoral indices, the Nifty Oil & Gas index (up 2.70%), the Nifty PSU Bank index (up 2.41%) and the Nifty Bank index (up 1.93%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty FMCG index (down 0.25%), the Nifty Realty index (up 0.55%) and the Nifty Media index (up 0.74%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **February** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **666** contracts at the end of the day.
- **Long** position build up for the **February** series has been witnessed in **RELIANCE, SBIN, INFY**.
- **Short** position build up for the **February** series has been witnessed in **TORNTPHARM, VOLTAS, HFCL**.
- **Unwinding** position for the **February** series has been witnessed in **LT, BHARTIARTL, ICICIBANK, HDFCBANK**.

(Source: Capitaline F&O)

NIFTY AUTO	23535.05	23327.00	0.89%
NIFTY FMCG	57274.70	57419.55	-0.25%
NIFTY IT	42860.20	42314.25	1.29%
NIFTY METAL	8301.45	8155.15	1.79%
NIFTY PHARMA	21733.95	21361.60	1.74%
NIFTY REALTY	954.95	949.70	0.55%
BSE CG	61947.54	59898.65	3.42%
BSE CD	60279.08	59718.83	0.94%
BSE Oil & GAS	24948.12	24363.60	2.40%
BSE POWER	6312.88	6170.24	2.31%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38798.37	38520.09	0.72%
HANG SENG	20789.96	20217.26	2.83%
STRAITS TIMES	3823.01	3826.47	-0.09%
SHANGHAI	3250.60	3250.60	-
KOSPI	2481.69	2453.95	1.13%
JAKARTA	7073.46	7030.06	0.62%
TAIWAN	22793.96	22694.71	0.44%
KLSE COMPOSITE	1564.56	1553.63	0.70%
ALL ORDINARIES	8633.40	8628.40	0.06%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	104198.59	104886.08
NSE F&O	13630557.94	10512938.99

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	809.23
NET SELL	-

(Source: [NSE](#))

## Corporate News

- Asian Paints** reported 23% drop in net profit at Rs 1,128 crore for the quarter ended December 31, 2024. It reported net profit of Rs 1,475 crore in the year-ago period. Revenue declined 6% to Rs 8,549 crore in Q3FY25 as against Rs 9,103 crore in Q3FY24.
- Power Grid Corporation of India** posted consolidated net profit fell 4.1% to Rs 3,861.63 crore in Q3 FY25 as against Rs 4,028.25 crore posted in Q3 FY24. Revenue from operations declined 2.7% YoY to Rs 11,233.03 crore recorded in the quarter ended 31 December 2024.
- Godrej Properties** reported 163% increase in consolidated net profit at Rs 163 crore for the quarter ended December 31, 2024. It reported a net profit of Rs 62 crore in the year-ago period. Revenue rose 194% to Rs 969 crore in Q3FY25 as against Rs 330 crore in Q3FY24.
- Zydus Wellness** posted consolidated net profit rose to Rs 6.40 crore in the quarter ended December 2024 from Rs 0.30 crore during the previous quarter ended December 2023. Sales rose 12.67% to Rs 450.80 crore in the quarter ended December 2024 as against Rs 400.10 crore during the previous quarter ended December 2023.
- ERIS Lifesciences** posted consolidated net profit declined 18.60% to Rs 83.63 crore in the quarter ended December 2024 as against Rs 102.74 crore during the previous quarter ended December 2023. Sales rose 49.36% to Rs 722.12 crore in the quarter ended December 2024 as against Rs 483.48 crore during the previous quarter ended December 2023.
- Gland Pharma's** consolidated net profit increased 6.67% to Rs 204.70 crore despite 10.42% decline in revenue from operations to Rs 1,384.1 crore in Q3 FY25 over Q3 FY24.
- NLC India** posted consolidated net profit surged 166.79% to Rs 668.09 crore on 39.41% rise in revenue from operations to Rs 4,411.41 crore in Q3 FY25 over Q3 FY24.
- KEC International** has reported 34% rise in net profit to Rs 130 crore on a 7% increase in revenues to Rs 5,349 crore in Q3 FY25 as compared with Q3 FY24.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	576.75	546.15	5.60%
LT	3439.15	3289.20	4.56%
BEL	284.50	274.15	3.78%
ADANIPOINTS	1125.10	1084.85	3.71%
INDUSINDBK	1047.15	1012.70	3.40%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
TRENT	5750.30	6135.10	-6.27%
BRITANNIA	5028.35	5105.55	-1.51%
HEROMOTOCO	4237.10	4286.65	-1.16%
NESTLEIND	2299.45	2317.10	-0.76%
EICHERMOT	5450.10	5485.25	-0.64%

(Source: [Moneycontrol](#))

- **Dabur** has shortened its strategic vision cycle from four years to three years amidst FMCG sector slowdown. It has enlisted McKinsey & Co to refine its strategies and ensure agility. The aim is to navigate volatile market conditions and emerging opportunities with a sharper focus and validated strategies.
- **GAIL (India) Ltd** has issued a swap tender offering 12 LNG cargoes from the U.S. in exchange for 12 cargoes delivered to India in 2026. The U.S. cargoes will be loaded monthly from Sabine Pass on a FOB basis, while the Indian deliveries will go to the Dhamra terminal on a DES basis. The tender closes on Feb. 19.

- **HFCL** posted consolidated net sales at Rs 1,011.95 crore in December 2024 down 1.97% from Rs. 1,032.31 crore in December 2023. Net profit at Rs. 73.65 crore in December 2024 down 10.43% from Rs. 82.23 crore in December 2023.
- **Tata Chemicals** posted consolidated net sales at Rs 3,590.00 crore in December 2024 down 3.75% from Rs. 3,730.00 crore in December 2023. Net loss at Rs. 53.00 crore in December 2024 down 133.54% from Rs. 158.00 crore in December 2023.
- **Jyoti Structures** posted consolidated net profit soared to Rs 11.48 crore in Q3 FY25 as compared with Rs 1.08 crore in Q3 FY24. Revenue from operations surged 146.15% to Rs 137.35 crore in Q3 FY25 as compared with Rs 55.80 crore posted in same quarter last year.
- **Doms Industries** reported 35.9% surge in consolidated net profit to Rs 50.73 crore in Q3 FY25 as against 37.34 crore posted in Q3 FY24. Revenue from operations jumped 34.8% YoY to Rs 501.11 crore in the quarter ended 31 December 2024.
- **Bajaj Electricals** posted consolidated net sales at Rs 1,289.72 crore in December 2024 up 5.01% from Rs. 1,228.24 crore in December 2023. Net profit at Rs. 33.36 crore in December 2024 down 10.71% from Rs. 37.36 crore in December 2023.
- **Avantel** said that it has received a purchase order worth of Rs 5.81 crore from Satish Dhawan Space Centre - SHAR, ISRO.

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

## Global News

- U.S. ISM said its manufacturing PMI rose to 50.9 in January from 49.2 in December.
- Spain's unemployment increased less than expected in January, the number of people out of work increased 38,725 in January from the previous month.

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

## Economic News

- Crude Oil traded at US\$ 71.74/bbl (IST 17:00).
- INR strengthened to Rs. 87.07 from Rs. 87.19 against each US\$ resulting in daily change of 0.14%.
- India's palm oil imports in January plunged to their lowest level in nearly 14 years. Palm oil imports plunged 46% in January from the previous month to 272,000 metric tons, the lowest since March 2011.

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

## Forthcoming Events

### Board Meetings as on 05/02/2025

Aarti Pharmed Labs Limited	Financial Results/Dividend
Arvind Fashions Limited	Financial Results
CCL Products (India) Limited	Financial Results
CMS Info Systems Limited	Financial Results/Dividend
Cummins India Limited	Financial Results/Dividend
Data Patterns (India) Limited	Financial Results
Eveready Industries India Limited	Financial Results
GE Vernova T&D India Limited	Financial Results
GTL Infrastructure Limited	Financial Results
Gujarat Gas Limited	Financial Results
H.G. Infra Engineering Limited	Financial Results
Info Edge (India) Limited	Financial Results/Stock Split
Innova Captab Limited	Financial Results
Jagran Prakashan Limited	Financial Results
Jocil Limited	Financial Results
K.M.Sugar Mills Limited	Financial Results
Kanpur Plastipack Limited	Financial Results
Kansai Nerolac Paints Limited	Financial Results
Matrimony.Com Limited	Financial Results
Medi Assist Healthcare Services Limited	Financial Results/Fund Raising
Medico Remedies Limited	Financial Results
Mindteck (India) Limited	Financial Results
Mrs. Bectors Food Specialities Limited	Financial Results/Dividend
National Highways Infra Trust	Financial Results/Dividend/Fund Raising

Navneet Education Limited	Financial Results
Nilkamal Limited	Financial Results
NRB Industrial Bearings Limited	Financial Results
Page Industries Limited	Financial Results/Dividend
Pilani Investment and Industries Corporation Limited	Financial Results
Ramco Systems Limited	Financial Results
Redington Limited	Financial Results
Reliance Power Limited	Financial Results
Ruchi Infrastructure Limited	Financial Results
Sagility India Limited	Financial Results
Shreyans Industries Limited	Financial Results
Skipper Limited	Financial Results
Solar Industries India Limited	Financial Results
Sula Vineyards Limited	Financial Results
Swiggy Limited	Financial Results
Symphony Limited	Financial Results/Dividend
Tega Industries Limited	Financial Results
Thangamayil Jewellery Limited	Financial Results
Timken India Limited	Financial Results
Tips Films Limited	Financial Results
Trigyn Technologies Limited	Financial Results
Vakrangee Limited	Financial Results
VRL Logistics Limited	Financial Results/Dividend
Welspun Corp Limited	Financial Results
Zydu Lifesciences Limited	Financial Results

(Source: NSE)

### Corporate Actions as on 05/02/2025

Coromandel International Limited	Interim Dividend - Rs 6 Per Share
Dr. Lal Path Labs Ltd.	Interim Dividend - Rs 6 Per Share
Indian Metals & Ferro Alloys Limited	Interim Dividend - Rs 5 Per Share
Manba Finance Limited	Interim Dividend - Re 0.25 Per Share
MAS Financial Services Limited	Interim Dividend - Re 1 Per Share
SHREE CEMENT LIMITED	Interim Dividend - Rs 50 Per Share
SMC Global Securities Limited	Interim Dividend - Rs 1.20 Per Share
Sona BLW Precision Forgings Limited	Interim Dividend - Rs 1.60 Per Share

(Source: NSE)

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