

















Indian Markets Overview

As of Today at 8:00 AM in the Morning

Name	Open/ Close	LTP	Change%	Change
 Sensex		76,190.46	-0.43%	329.92
 Nifty 50		23,092.20	-0.49%	113.15
 Nifty Bank		48,367.80	-0.46%	221.20
 India Vix		16.74	0.24%	0.04

Global Markets Overview

As of Today at 7:30 AM in the Morning

Name	Open/ Close	LTP	Change%	Change
 Gift Nifty	 India	22,957.50	-0.75%	173.50
 Dow Jones	 US	44,424.25	-0.32%	140.82
 Nasdaq	 US	19,956.29	-0.49%	97.39
 S&P 500	 US	6,101.77	-0.28%	16.94
 GOLD	 World	(\$) 2,771.49	0.05%	1.35
 Hang Seng	 China	20,205.89	0.70%	139.70
 FTSE 100	 Europe	8,502.35	-0.74%	62.85
 USD/ INR	 Currency	86.2100	-0.30%	0.2600
 Bitcoin	 Crypto	101,640.2	-2.87%	----
 ETH	 Crypto	3,203.01	-3.65%	----

Market Bulletin



- Indian shares fell on Friday, marking three straight weeks of losses due to concerns over slowing corporate earnings.
- FMCG sector emerged as the best performer, HUL, with a price increase of 2 percent, while Dr Reddy's Labs was the biggest loser.
- **Religare Enterprises:** US businessman Danny Gaekwad proposed acquiring a 26% stake in the company.
- RBI has imposed a monetary penalty of Rs 1 cr on Bank of India, Rs 3.31 cr on Jammu and Kashmir Bank, and Rs 1.63 cr on Canara Bank.
- **US markets** slipped on 24 Jan, amid concerns around the profitability of semiconductor stocks.
- **European** equities saw mild gains, driven by positive earnings and strong economic data across key sectors.
- **LME Lead** fluctuated due to ongoing market uncertainties around US tariffs.
- **Crude oil** rises sharply due to heightened geopolitical risks, tighter sanctions on Russian exports, and declining feedstock inventories.
- Coal India, Tata Steel, ACC, Canara Bank, Adani Total Gas, AMC, Apollo Pipes, Adani Wilmar, Emami, Federal Bank, IOC, Kaynes Technology India, etc will release quarterly earnings on 27 Jan.
- **ICICI Bank's Q3:** Profit grew by 14.8% to ₹11,792.4 cr, net interest income rising by 9% YoY to ₹20,370.6 cr. Gross NPA dropped slightly to 1.96%.
- **Capital Numbers Infotech** will list on the BSE SME platform on January 27th.
- KEI Industries, and POWERGRID Infrastructure Investment Trust, Tanla Platforms are trading ex-dividend today.

Technical Analysis

Nifty 50

- Nifty has been trading in a consolidated range for a long time now, and on Friday after taking a rejection on upper bound of the range, it closed near the lower bound of the range below 23,100.
- Now the 23,000-level demand zone is the crucial level which looks like to be broken as price action is looking weak and we may expect Nifty to fall up to 22,800 levels soon.

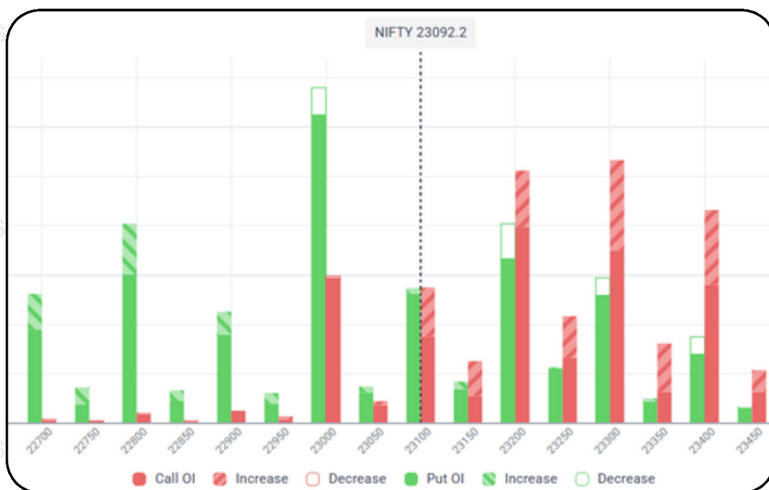
Time Frame: 1 hour



MAJOR SUPPORT : 23000, 22800

MAJOR RESISTANCE : 23150, 23280

Derivatives Data



- For the monthly expiry, bears look more aggressive as there was an increase of Call OI with 3.02Cr contracts compared to an increase of 1.05Cr in Put OI.
- There was a decrease in OI at multiple strikes and most importantly the 23000 strike which was an important support, saw decrease in Put OI reflecting fear of further downside.

Technical Analysis

BANKNIFTY

- On Friday, Bank Nifty made an attempt to break 48,850 level but took rejection from the supply zone and fell strongly to 48,350.
- Earlier, it was showing some signs of recovery by forming higher highs and higher lows structure on 15m tf, but again its structure is looking weak and looks ready to reach 48,000.

Time Frame: 15 min



MAJOR SUPPORT : 48200, 48000

MAJOR RESISTANCE : 48400, 48600

SENSEX

Time Frame: 4 hour



- On Friday after a long tail rejection from 77,000, Sensex has given a closing on an important level at 4h tf near 76,200 level which was a demand zone.

- This level has been breached once, making it less impactful now and looks likely to be broken in upcoming sessions. If it happens so, then 75,600 could be the next target.

MAJOR SUPPORT : 75600, 75000

MAJOR RESISTANCE : 76700, 77000

Stocks In NEWS

1. **KEC International**- RPG Group company has bagged an order worth ₹1,445 crore for transmission lines from Power Grid Corporation.

2. **Jubilant Ingrevia**- The company has commissioned a new cGMP-compliant facility for Niacinamide, with high bio-content, in Bharuch, Gujarat.

3. **Aditya Birla Real Estate**- Birla Estates and Mitsubishi Estate Co. are teaming up for a ₹560 crore residential project in Southeast Bengaluru.

4. **Refex Industries**- Venwind Refex Power and Torrent Solar Power to supply WTGs for a 153.7 MW wind project in Karnataka.

5. **Ceigall India**- The company emerged as the L1 bidder for an ₹864.97 crore road project by the NHAI in Punjab.

6. **Mazagon Dock Shipbuilders**- Thyssenkrupp Marine Systems (TKMS) and Mazagon Dockyard's bid for Project 75 (I) found compliant, according to CNBC-TV18.

7. **RPP Infra Projects**- The company received a ₹87.56 crore project acceptance from Greater Chennai Corporation.

8. **Yes Bank's Q3**- Profit soared 164.5% to ₹612 cr, net interest income grew 10.2% to ₹2,224 cr, and provisions dropped 53.4% to ₹259 cr.

9. **Macrotech Developers Q3**- Profit surged 87% to ₹944.8 crore, with revenue rising 39.3% to ₹4,083 crore.

10. **NTPC Green Energy's Q3**- Profit soared 52.3% to ₹89.4 crore, with revenue rising 4.1% to ₹460.9 crore.



Stocks In NEWS

1. **JSW Steel**- Nippon Ispat Singapore (Pte) Ltd, a non-operating subsidiary, was officially liquidated on 24 Jan, 2025. Also major drop in quarterly results.

2. **Unichem Laboratories**- The company faces a ₹6.58 crore interest demand and ₹87.07 crore penalty for delayed tax payments.

3. **JK Cement's Q3**- Profit fell 33.2% to ₹189.6 crore, while revenue dipped 0.2% to ₹2,930.3 crore. The company is acquiring a 60% stake in Saifco Cement for ₹174 crore.

4. **InterGlobe Aviation Q3**- Profit dropped 18.3% to ₹2,448.8 cr, while revenue grew 13.7% to ₹22,110.7 cr. EBITDAR increased 10.7% to ₹6,058.7 crore,

5. **Godrej Consumer Q3**- Profit fell 14.2% to ₹498.3 cr, while revenue rose 3% to ₹3,768.4 cr. EBITDA dropped 10.08% to ₹755.9 crore.



Consumer Products Ltd.

RESULT BASED STOCKS LIST

- LAURUS LABS
- TORRENT PHARMA
- JSW STEEL
- DLF
- GODREJ PROPERTIES
- AU SMALL FINANCE BANK
- BANK OF INDIA
- INDIGO
- SHRI RAM FINANCE
- BALKRISHNA INDUSTRIES
- NTPC
- CDSL
- ICICI BANK
- JK CEMENT
- IDFC FIRST

Stocks in F&O BAN

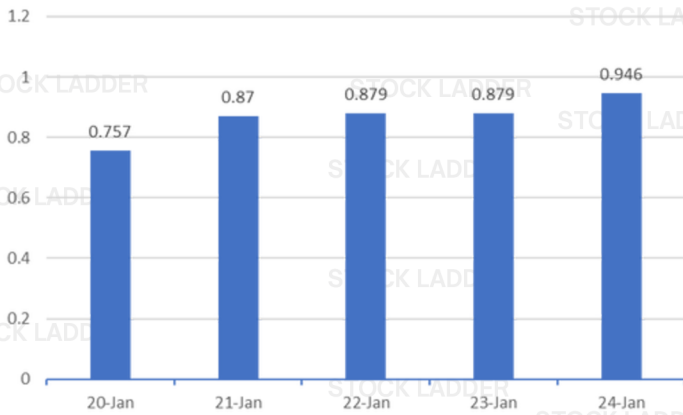
- PNB
- MGL
- INDIAMART
- LTF
- MANAPPURAM
- DIXON
- CAN FIN HOME
- ABRFL
- BANDHAN BANK

FII/DII DATA

FII / DII: Net Buy/(Sell)		(Rs. Crores)
Fri, 24 Jan 2025		
FII Cash Market*		-2,758.49
DII Cash Market*		+2,402.31
+ FII Index Futures		+303.22
+ FII Index Options		-12,745.12
FII Stock Futures		+188.33
FII Stock Options		+332.20

- FII sold stocks worth ₹2758.49Cr, taking their net selling in month of January more than combined selling in month of November and December.
- In derivatives segment, major activity was in index options on Friday, where FIIs sold index options contract worth ₹12,745.12Cr.

PCR DATA



A PCR (Put Call Ratio) above 1 indicates an increase in bearish sentiment.

A PCR below 1 indicates an increase in bullish sentiment.

However, it is important to analyse the recent trend of PCR to get a clear picture of the overall market sentiment shift.

LONG BUILDUP

Name	1D OI% Change
SBI CARD	+8.54%
MPHASIS	+7.01%
LODHA	+2.82%
COLPAL	+1.54%
WIPRO	+1.45%

SHORT BUILDUP

Name	1D OI% Change
CYIENT	+124.34%
PRESTIGE	+10.88%
PAYTM	+10.82%
APOLLO TYRE	+10.57%
HINDPETRO	+9.87%

Top 5 stocks based on Futures Open Interest change on last trading session



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