

MARKET MIRROR

DAILY NEWSLETTER

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WATCH INDICES

DAILY MARKET MIRROR

INDIAN INDICES

EQUITY	CLOSE	CHANGE	CHANGE(%)
SENSEX	79,942.18	-426.85	-0.53
NIFTY	24,340.85	-126.00	-0.51
BSE MCAP	46,121.42	17.74	0.04
BSE SMCAP	54,108.03	818.44	1.54
BSE BANKEX	59,235.69	-433.44	-0.73
BSE METAL	31,539.09	164.08	0.52
BSE IT	41,834.75	68.68	0.16
BSE FMCG	43,116.91	-56.68	-0.13
BSE OIL & GAS	27,639.69	8.54	0.03
BSE AUTO	54,068.57	340.08	0.63

WORLD INDICES

EQUITY	CLOSE	CHANGE	CHANGE(%)
Dow Jones	42,141.54	-91.51	-0.22
Nasdaq	18,607.93	-104.82	-0.56
Dow Futures*	42,305.00	-58.00	-0.14
Nikkei*	39,116.79	-160.60	-0.41
Hangseng*	20,534.58	153.94	0.76

NIFTY

80067

SUPPORT	RESISTANCE
24266	24457
24191	24573
24075	24648

SENSEX

24382

SUPPORT	RESISTANCE
79698	80311
79453	80680
79084	80925

WATCH INDICES

DAILY MARKET MIRROR

NET FLOWS Rs.

EQUITY	CHANGE(%)
FII (cash)	-4,613.65
DII (cash)	4,518.28
FII Index Futures	-1465.16
FII Index Options	-35064.67
FII Stock Futures	-1754.71
FII Stock Options	-832.41

INDIAN ADRs

EQUITY	CLOSE	CHANGE	CHANGE(%)
Dr Reddy ADR	74.16	-0.99	-1.32
HDFC Bank ADR	64.17	-0.46	-0.71
ICICI Bank ADR	31.29	0.04	0.13
Infosys ADR	21.12	-0.65	-2.99
TATA MOTOR ADR	25.14	0.00	0.00
Wipro ADR	6.68	-0.06	-0.89

CURRENCY

Near Month Expiry Contract

SYMBOLS	HIGH	LOW	CLOSE	R3	R2	R1	PIVOT	S1	S2	S3
EURINR 1	91.31	90.90	91.16	94.71	93.01	94.30	92.60	93.88	92.18	93.47
GBPINR 2	109.53	109.26	109.32	111.91	110.72	111.64	110.45	111.36	110.17	111.09
JPYINR 1	0.55	0.55	0.55	0.60	0.58	0.60	0.57	0.60	0.57	0.59
USDINR 1	84.09	84.06	84.08	83.89	83.99	83.86	83.96	83.83	83.93	83.80

INDIA VIX

CLOSE	CHANGE	CHANGE(%)
15.51	1.00	6.85

L&T Q2 FY25 (Consolidated, YoY): Revenue up 20.63 per cent at Rs 61,554 crore versus Rs 51,024 crore. Ebitda up 12.94 per cent at Rs 6,362 crore versus Rs 5,633 crore. Ebitda margin down 70 bps at 10.33 per cent versus 11.03 per cent. Net profit up 6.69 per cent at Rs 4,113 crore versus Rs 3,855 crore.

Tata Power Q2 FY25 (Consolidated, YoY): Revenue down 0.26 per cent at Rs 15,698 crore versus Rs 15,738 crore. Ebitda up 21.19 per cent at Rs 3,746 crore versus Rs 3,091 crore. Ebitda margin up 422 bps at 23.86 per cent versus 19.64 per cent. Net profit up 7.47 per cent at Rs 1,093 crore versus Rs 1,017 crore.

DCM Shriram Q2 FY25 (Consolidated, YoY): Revenue up 9.09 per cent at Rs 2,940 crore versus Rs 2,695 crore. Ebitda up 62.37 per cent at Rs 164 crore versus Rs 101 crore. Ebitda margin up 183 bps at 5.57 per cent versus 3.74 per cent. Net profit up 96.87 per cent at Rs 63 crore versus Rs 32 crore. Approved Rs 310 crore capex proposal for new facilities.

Biocon Q2 FY25 (Consolidated, YoY): Revenue up 3.69 per cent at Rs 3,590 crore versus Rs 3,462 crore. Ebitda down 7.54 per cent at Rs 686 crore versus Rs 742 crore. Ebitda margin down 232 bps at 19.1 per cent versus 21.43 per cent. Net profit down 84.3 per cent at Rs 27 crore versus Rs 172 crore.

IRB Infrastructure Developers Q2 FY25 (Consolidated, YoY): Revenue down 9.12 per cent at Rs 1,586 crore versus Rs 1,745 crore. Ebitda down at Rs 767 crore versus Rs 794 crore. Ebitda margin up 285 bps at 48.36 per cent versus 45.5 per cent. Net profit up 5.26 per cent at Rs 100 crore versus Rs 95 crore.

New India Assurance Q2 FY25 (Consolidated, YoY): Net premium earned up 3.9 per cent at Rs 8,567 crore versus Rs 8,245 crore. Net profit at Rs 73.6 crore versus loss of Rs 195 crore.

Electrosteel Castings Q2 FY25 (Consolidated, YoY): Revenue down 4.75 per cent at Rs 1,828 crore versus Rs 1,919 crore. Ebitda down at Rs 268 crore versus Rs 299 crore. Ebitda margin down 92 bps at 14.66 per cent versus 15.58 per cent. Net profit down 11.42 per cent at Rs 155 crore versus Rs 175 crore.

TCI Express Q2 FY25 (Consolidated, YoY): Revenue down 2.5 per cent at Rs 312 crore versus Rs 320 crore. Ebitda down 25.84 per cent at Rs 37.3 crore versus Rs 50.3 crore. Ebitda margin down 376 bps at 11.95 per cent versus 15.71 per cent. Net profit down 30.55 per cent at Rs 25 crore versus Rs 36 crore.

Automotive Axles Q2 FY25 (Consolidated, YoY): Revenue down 15.24 per cent at Rs 495 crore versus Rs 584 crore. Ebitda down 20.91 per cent at Rs 51.8 crore versus Rs 65.5 crore. Ebitda margin down 75 bps at 10.46 per cent versus 11.21 per cent. Net profit down 20 per cent at Rs 36 crore versus Rs 45 crore.

RVNL: The company has received a letter of acceptance worth Rs 284 crore for construction work from East Coast Railway.

Zydus Wellness: The company will acquire a 100 per cent stake in Naturell (India) for Rs 390 crore, marking a strategic move into the healthy consumer snacking space.

Biocon: The pharma company's drug substance facility in Bengaluru has been classified as voluntary action indicated by the US FDA.

Ujjivan Small Finance Bank: S. Balakrishna Kamath will take charge as CFO of the bank effective December 5.

Adani Green: The company's unit has entered into power purchase agreements with Maharashtra State Electricity Distribution Company for the supply of 5 GW of solar power.

Sonata Software: The company has signed a contract with a Fortune 50 American multinational technology conglomerate for global retail operations.

SECURITIES IN BAN

COMPANY NAME		
IDFCFIRSTB	PNB	RBLBANK
INDIAMART		

RESULT

COMPANY NAME		
Last Mile Enterprises Ltd	Sonalis Consumer Products Ltd	TATA INVESTMENT CORPORATION LTD.
Narayana Hrudayalaya Ltd	Sudarshan Pharma Industries Ltd	

FOR MORE DETAILS

https://www.bseindia.com/corporates/Forth_Results.html?expandable=0

CORPORATE ACTIONS

DAILY MARKET MIRROR

COMPANY NAME	DATE	ACTIONS
CAPRIHANS INDIA LTD.-\$	31-Oct-24	E.G.M.
CEENIK EXPORTS (INDIA) LTD.	31-Oct-24	Interim Dividend - Rs. - 15.0000
Cube Highways Trust	31-Oct-24	Income Distribution (InvIT)
Dodla Dairy Ltd	31-Oct-24	Interim Dividend - Rs. - 3.0000
GODREJ CONSUMER PRODUCTS LTD.	31-Oct-24	Interim Dividend - Rs. - 5.0000
IRB InvIT Fund	31-Oct-24	Income Distribution (InvIT)
Julien Agro Infratech Ltd	31-Oct-24	Interim Dividend - Rs. - 0.0500
JYOTI STRUCTURES LTD.	31-Oct-24	E.G.M.
NTPC LTD.	31-Oct-24	Interim Dividend - Rs. - 2.5000
RAMKRISHNA FORGINGS LTD.	31-Oct-24	Interim Dividend - Rs. - 1.0000
R R Kabel Ltd	31-Oct-24	Interim Dividend - Rs. - 2.5000
Sellwin Traders Ltd	31-Oct-24	Stock Split From Rs.10/- to Rs.2/-
Sellwin Traders Ltd	31-Oct-24	Bonus issue 1:8
SUPREME PETROCHEM LTD.	31-Oct-24	Interim Dividend - Rs. - 2.5000
TRANSPORT CORPORATION OF INDIA LTD.	31-Oct-24	Interim Dividend - Rs. - 3.5000

FOR MORE DETAILS

https://www.bseindia.com/corporates/Forth_Results.html?expandable=0

TECHNICAL MIRROR

DAILY MARKET MIRROR

STOCKS

Today's Pivot Report: NSE NIFTY 50 Stocks, Nifty Future & Bank Nifty Future.

SYMBOLS	HIGH	LOW	CLOSE	R3	R2	R1	PIVOT	S1	S2	S3
BANKNIFTY	52244	51712.1	51798.6	52656.27	52450.13	52124.37	51918.23	51592.47	51386.34	51060.57
NIFTY	24520	24314.95	24371.05	24694.1	24607.05	24489.05	24402	24284	24196.95	24078.95
ADANIENT	2997.15	2815.05	2969.3	3221.38	3109.27	3039.28	2927.17	2857.18	2745.07	2675.08
ADANIPTS	1414.9	1358.05	1396.2	1478.23	1446.57	1421.38	1389.72	1364.53	1332.87	1307.68
APOLLOHOSP	7035	6939.8	6982.5	7126.93	7080.97	7031.73	6985.77	6936.53	6890.57	6841.33
ASIANPAINT	3006	2963.55	2996.65	3056.37	3031.18	3013.92	2988.73	2971.47	2946.28	2929.02
AXISBANK	1187.65	1164.3	1170.4	1207.28	1197.47	1183.93	1174.12	1160.58	1150.77	1137.23
BAJAJ-AUTO	10057.75	9770	9940.65	10363.35	10210.55	10075.6	9922.8	9787.85	9635.05	9500.1
BAJAJFINSV	1777.45	1740.2	1752.45	1810.45	1793.95	1773.2	1756.7	1735.95	1719.45	1698.7
BAJFINANCE	7020.45	6932	6955	7094.75	7057.6	7006.3	6969.15	6917.85	6880.7	6829.4
BEL	294.75	282.05	288.55	307.55	301.15	294.85	288.45	282.15	275.75	269.45
BHARTIARTL	1651	1617.8	1633.35	1683.5	1667.25	1650.3	1634.05	1617.1	1600.85	1583.9
BPCL	314.9	307.35	311.3	322.57	318.73	315.02	311.18	307.47	303.63	299.92
BRITANNIA	5799	5641.6	5782.5	5997.87	5898.43	5840.47	5741.03	5683.07	5583.63	5525.67
CIPLA	1440	1403	1418.25	1474.83	1457.42	1437.83	1420.42	1400.83	1383.42	1363.83
COALINDIA	455.8	445	449.15	465.77	460.78	454.97	449.98	444.17	439.18	433.37
DRREDDY	1273	1228.8	1249.85	1316.5	1294.75	1272.3	1250.55	1228.1	1206.35	1183.9
EICHERMOT	4947.75	4850.1	4869.25	5025.62	4986.68	4927.97	4889.03	4830.32	4791.38	4732.67
GRASIM	2708.6	2666.05	2672.55	2741.3	2724.95	2698.75	2682.4	2656.2	2639.85	2613.65
HCLTECH	1869.45	1835.3	1838.8	1894.55	1882	1860.4	1847.85	1826.25	1813.7	1792.1
HDFCBANK	1754.75	1724.2	1734.6	1782.05	1768.4	1751.5	1737.85	1720.95	1707.3	1690.4
HDFCLIFE	745	724.55	727.05	760.3	752.65	739.85	732.2	719.4	711.75	698.95
HEROMOTOCO	5037.5	4740.1	4909.3	5348.57	5193.03	5051.17	4895.63	4753.77	4598.23	4456.37
HINDALCO	698.8	685.4	688.4	709.73	704.27	696.33	690.87	682.93	677.47	669.53
HINDUNILVR	2563.3	2533.4	2554.95	2597.6	2580.45	2567.7	2550.55	2537.8	2520.65	2507.9
ICICIBANK	1330.9	1305.6	1312.15	1352.13	1341.52	1326.83	1316.22	1301.53	1290.92	1276.23

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INDUSINDBK	1069.4	1030.25	1056.4	1112.93	1091.17	1073.78	1052.02	1034.63	1012.87	995.48
INFY	1839	1796.35	1802.1	1871.27	1855.13	1828.62	1812.48	1785.97	1769.83	1743.32
ITC	493.25	486.5	491.55	501.12	497.18	494.37	490.43	487.62	483.68	480.87
JSWSTEEL	968.55	952.3	957.3	982.72	975.63	966.47	959.38	950.22	943.13	933.97
KOTAKBANK	1760	1726.6	1734.6	1787.6	1773.8	1754.2	1740.4	1720.8	1707	1687.4
LT	3438.4	3353	3408.35	3532.23	3485.32	3446.83	3399.92	3361.43	3314.52	3276.03
M&M	2755.85	2669.05	2707.7	2839.48	2797.67	2752.68	2710.87	2665.88	2624.07	2579.08
MARUTI	11520	10945	11256.45	12110.97	11815.48	11535.97	11240.48	10960.97	10665.48	10385.97
NESTLEIND	2297.25	2260.2	2276.3	2332.68	2314.97	2295.63	2277.92	2258.58	2240.87	2221.53
NTPC	414.8	405.8	408.5	422.6	418.7	413.6	409.7	404.6	400.7	395.6
ONGC	266.2	261.05	261.65	270.03	268.12	264.88	262.97	259.73	257.82	254.58
POWERGRID	325.4	316.75	318.45	332.3	328.85	323.65	320.2	315	311.55	306.35
RELIANCE	1350	1325.35	1343.9	1378.8	1364.4	1354.15	1339.75	1329.5	1315.1	1304.85
SBILIFE	1649.35	1619.3	1624.15	1672.62	1660.98	1642.57	1630.93	1612.52	1600.88	1582.47
SBIN	833	821.05	822.45	841.9	837.45	829.95	825.5	818	813.55	806.05
SHRIRAMFIN	3259.7	3176.95	3185.8	3320.77	3290.23	3238.02	3207.48	3155.27	3124.73	3072.52
SUNPHARMA	1880.9	1820	1852.1	1942.9	1911.9	1882	1851	1821.1	1790.1	1760.2
TATACONSUM	1027	988.15	1022.7	1075.93	1051.47	1037.08	1012.62	998.23	973.77	959.38
TATAMOTORS	853.6	838.05	840.2	865.4	859.5	849.85	843.95	834.3	828.4	818.75
TATASTEEL	150.95	148.1	148.97	153.43	152.19	150.58	149.34	147.73	146.49	144.88
TCS	4107	4060.05	4084.65	4154.7	4130.85	4107.75	4083.9	4060.8	4036.95	4013.85
TECHM	1712.15	1682.25	1684.95	1733.88	1723.02	1703.98	1693.12	1674.08	1663.22	1644.18
TITAN	3321.8	3235.1	3308.45	3428.5	3375.15	3341.8	3288.45	3255.1	3201.75	3168.4
TRENT	7428.8	7215	7252.45	7596.3	7512.55	7382.5	7298.75	7168.7	7084.95	6954.9
ULTRACEMCO	11230	11011.4	11205.1	11504.87	11367.43	11286.27	11148.83	11067.67	10930.23	10849.07
WIPRO	578.75	561.1	565.25	593.28	586.02	575.63	568.37	557.98	550.72	540.33

RESEARCH TEAM

Kiran Jani Research head (Technical)		Vaishali Patel Sr.Research Analyst (Technical)	
Ashish Maurya Jr.Research Analyst (Technical)	Bhargav Rangrej Jr.Research Analyst (Technical)	Maan Thakkar Jr.Research Analyst (Technical)	Saikumar Kokkula Jr.Research Analyst (Technical)

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