

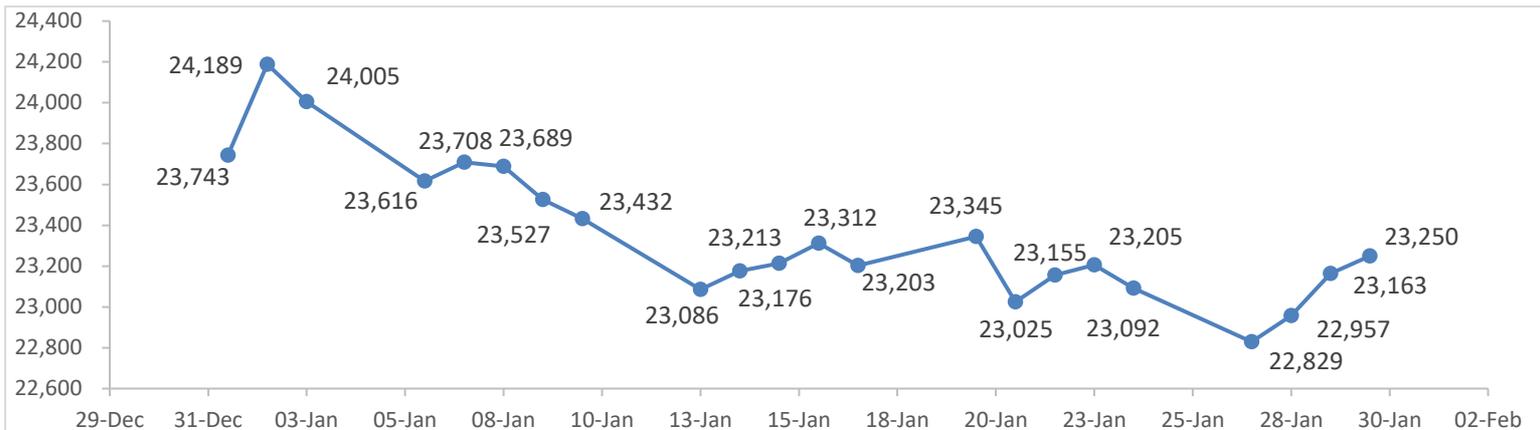
### Nifty 50

23,508.4 **136.4**  
(-0.58%)

52 Week High: 26,277.4

52 Week Low: 21,281.4

| Resistance |          | Support |          |
|------------|----------|---------|----------|
| R1         | 23,597.6 | S1      | 23,357.6 |
| R2         | 23,671.7 | S2      | 23,283.5 |
| R3         | 23,791.7 | S3      | 23,163.5 |



| Sectorial Indices | Prev. Close (31-Dec'24) | Close (31-Jan'25) | % Change (1M) |
|-------------------|-------------------------|-------------------|---------------|
| Nifty Auto        | 22,834                  | 22,868            | 0.1%          |
| Nifty PSU Bank    | 6,541                   | 6,317             | -3.4%         |
| Nifty Pharma      | 23,412                  | 21,439            | -8.4%         |
| Nifty IT          | 43,338                  | 42,663            | -1.6%         |
| Nifty FMCG        | 56,800                  | 56,692            | -0.2%         |
| Nifty Metal       | 8,650                   | 8,400             | -2.9%         |
| Nifty Fin Serv    | 23,513                  | 23,221            | -1.24%        |
| Nifty Cons        | 41,774                  | 37,591            | -10.0%        |

| Global Indices | Prev. Close (31-Dec'24) | Close (31-Jan'25) | % Change (1M) |
|----------------|-------------------------|-------------------|---------------|
| Dow Jones      | 42,544                  | 44,545            | 4.7%          |
| Nasdaq         | 19,311                  | 19,627            | 1.6%          |
| FTSE           | 8,173                   | 8,674             | 6.1%          |
| Hang Seng      | 20,060                  | 20,225            | 0.8%          |
| USD/INR        | 86                      | 87                | 0.9%          |
| GBP/INR        | 108                     | 107               | -0.3%         |

| Net Flow  | Amount (Rs Cr) | Index      | Prev. Close (31-Dec'24) | Close (31-Jan'25) | % Change (1M) |
|-----------|----------------|------------|-------------------------|-------------------|---------------|
| FII       | -87,375        | SENSEX     | 78,139                  | 77,501            | -0.8%         |
| DII       | 86,591         | NIFTY 50   | 23,645                  | 23,508            | -0.6%         |
| MF Equity | 57,876         | BANK NIFTY | 50,860                  | 49,587            | -2.5%         |
| MF Debt   | 43,227         |            |                         |                   |               |

| Top Gainers | Prev. Close (31-Dec'24) | Close (31-Jan'25) | % Change (1M) |
|-------------|-------------------------|-------------------|---------------|
| BAJFINANCE  | 6,823                   | 7,885             | 15.6%         |
| TATACONSUM  | 915                     | 1,025             | 12.0%         |
| MARUTI      | 10,858                  | 12,311            | 13.4%         |
| WIPRO       | 302                     | 312               | 3.3%          |
| BAJAJFINSV  | 1,568                   | 1,736             | 10.7%         |

| Top Losers | Prev. Close (31-Dec'24) | Close (31-Jan'25) | % Change (1M) |
|------------|-------------------------|-------------------|---------------|
| TRENT      | 7,123                   | 5,753             | -19.2%        |
| BPCL       | 292                     | 261               | -10.7%        |
| HCLTECH    | 1,917                   | 1,725             | -10.0%        |
| ADANIENT   | 2,529                   | 2,288             | -9.5%         |
| TATAMOTORS | 740                     | 716               | -3.2%         |

| Commodities | Prev. Close (31-Dec'24) | Close (31-Jan'25) | % Change (1M) |
|-------------|-------------------------|-------------------|---------------|
| Gold        | 76,748                  | 82,233            | 7.1%          |
| Silver      | 87,233                  | 93,446            | 7.1%          |
| Crude (WTI) | 72                      | 73                | 1.1%          |

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### Trump's 100% tariff threat to BRICS members, including India:

President Donald Trump cautioned BRICS member countries against replacing the U.S. dollar as the global reserve currency, reiterating a threat of 100% tariffs that he had issued after winning the US elections in November. In December 2024, Russia had said that any attempt to force BRICS countries to use the dollar, would only strengthen the demand for national currencies.

### 10-year U.S. Treasury yields increased:

Yields on 10-year U.S. Treasuries are over 100 basis points higher than their September lows – while the Federal Reserve has been lowering its target policy rate. That’s unusual. In the previous seven cutting cycles by the Federal Reserve going back to the 1980s, the yield on the 10-year Treasury was lower 100% of the time 100 days after the first rate cut. Economic uncertainty is major factor contributing to the upward pressure on yields.

### RBI’s ₹ 1.5 lakh crore boost to banking system:

The latest Reserve Bank of India (RBI) measures worth Rs 1.5 lakh crore to inject liquidity into the banking system should ease the stress in money markets, while the start of bond purchases is also likely to drive rupee rates lower through signalling effect and expectation channel that RBI will avoid any tightening of liquidity conditions and will potentially need to do more open market operation (OMO) purchases.

### Dollar at two-year high on growth outlook :

The U.S. dollar jumped to a two-year high on Thursday in the first day of 2025 trading, building on last year's strong gains on expectations U.S. growth will beat peers and keep U.S. interest rates relatively elevated. The Federal Reserve has indicated that it will be more cautious in cutting interest rates as inflation remains stubbornly above its 2% annual target and the economy remains strong. Policies by U.S. President-elect Donald Trump are also expected to boost growth and potentially add to upward price pressures.

### Trump tells Putin to end 'ridiculous war' in Ukraine or face new sanctions:

Donald Trump has warned he will impose high tariffs and further sanctions on Russia if Vladimir Putin fails to end the war in Ukraine. Writing on his social media platform Truth Social, he said that by pushing to settle the war he was doing Russia and its president a "very big favour". Trump had previously said he would negotiate a settlement to Russia's full-scale invasion launched in February 2022, in a single day.

### IPO Update :-

| Company Name              | IPO Date (Jan'25) | Market Response        |
|---------------------------|-------------------|------------------------|
| Indo Farm Equipment       | 31 Dec – 2 Jan    | 227.67x oversubscribed |
| Standard Glass Lining     | 6 Jan – 8 Jan     | 185.48x oversubscribed |
| Quadrant Future Tek       | 7 Jan – 9 Jan     | 195.96x oversubscribed |
| Capital Infra Trust Invit | 7 Jan – 9 Jan     | 2.8x oversubscribed    |
| Laxmi Dental              | 13 Jan – 15 Jan   | 114.14x oversubscribed |
| Stallion India            | 16 Jan – 20 Jan   | 188.32x oversubscribed |
| Denta Water               | 22 Jan – 24 Jan   | 221.54x oversubscribed |
| Dr Agarwal’s Healthcare   | 29 Jan – 31 Jan   | 1.49x oversubscribed   |

| Company Name        | Upcoming IPO’s |
|---------------------|----------------|
| Arisinfra Solutions | 3 Feb – 5 Feb  |

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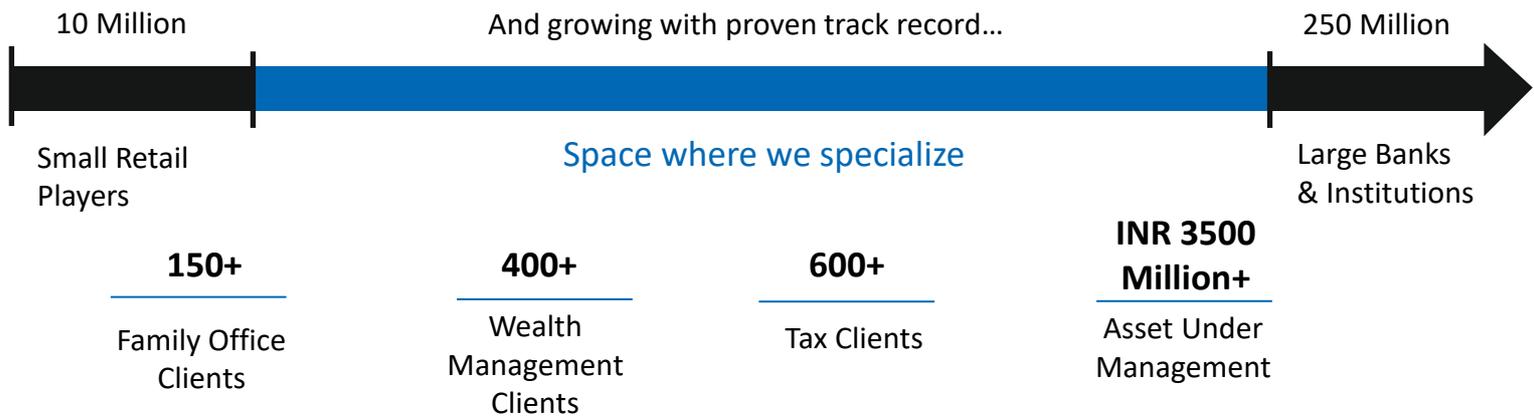
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