

### Market Snapshot (Updated at 8AM)

Indian Indices	Close	Net Chng.	Chng. (%)
Sensex	60431.84	250.86	0.41
Nifty	17770.90	85.60	0.48

Global Indices	Close	Net Chng.	Chng. (%)
DOW JONES	34245.93	376.66	1.11
NASDAQ COM.	11891.79	173.67	1.48
FTSE 100	7947.60	65.15	0.83
CAC 40	7208.59	78.86	1.11
DAX	15397.34	89.36	0.58
NIKKEI 225	27586.95	159.25	0.58
SHANGHAI	3291.75	7.51	0.23
HANG SENG	21154.01	26.94	0.13

Currency	Close	Net Chng.	Chng. (%)
USD / INR	82.73	0.22	0.27
USD / EUR	1.07	0.00	0.07
USD / GBP	1.21	0.00	0.02
USD / JPY	132.19	0.40	0.30

Precious Metals	Close	Net Chng.	Chng. (%)
Gold (USD)	1856.67	3.16	0.17
Silver	21.98	0.11	0.52

Energy	Close	Net Chng.	Chng. (%)
NYMEX Crude	79.22	0.91	1.14
Brent Crude	85.92	0.68	0.79
Natural Gas	2.44	0.03	1.29

Bond	Close	Net Chng.	Chng. (%)
10 Yrs G-Sec	7.37	0.00	0.03

Indian ADRs	Close	Net Chng.	Chng. (%)
Dr. Reddy's Lab	55.31	0.40	0.73
HDFC Bank	68.91	0.94	1.38
ICICI Bank	20.67	0.09	0.44
Infosys Ltd	19.02	0.14	0.73
Wipro	19.02	0.14	0.73

### Institutional Flow (In Crore) 13-02-2023

Institution	Purchase	Sale	Net
FII	7386.63	6064.24	1322.39
DII	5361.52	4839.83	521.69

### Key Contents

- ⇒ [Today's Highlights](#)
- ⇒ [Global News, Views and Updates](#)
- ⇒ [Links to important News highlight](#)

### Top News for Today

- **Shree Renuka Sugars:** The Company commenced commissioning activities of its expanded ethanol production capacity at Athani (from 300 KLPD to 450 KLPD) and at Munoli (from 120 KLPD to 500 KLPD).
- **Maruti Suzuki India/ South Indian Bank:** The automobile major has signed an MoU with the bank to offer dealer finance options and customised auto retail financing solutions for customers.
- **HeidelbergCement India:** The board approved the appointment of Joydeep Mukherjee as managing director of the company for a term of three years, effective April 1, 2023.

### Events of the Day

- **Todays Result:** Adani Enterprises, Apollo Hospitals Enterprise, Arvind Fashions, Aster DM Healthcare, Bata India, Bharat Forge, Biocon, Bosch, CESC, DB Realty, Eicher Motors, EID-Parry (India), Eureka Forbes, Gujarat Mineral Development Corporation, GMR Airports Infrastructure, Grasim Industries, Harsha Engineers International, HEG, Indiabulls Housing Finance, Ipca Laboratories, Jindal Poly Films, Jupiter Wagons, La Opala RG, Maithan Alloys, NBCC (India), National Highways Infra Trust, Nilkamal, NMDC, Oil And Natural Gas Corporation, PI Industries, Prestige Estates Projects, Radico Khaitan, Rajesh Exports, Raj Rayon Industries, Shyam Metalics And Energy, Siemens, SpiceJet, Swan Energy, TCNS Clothing Co., Techno Electric & Engineering Company, Torrent Power, Uflex
- **Concall for today:** 1:00 PM Bharat Forge, 1:00 PM G R Infraprojects Limited, 10:30 AM Capacite Infra, 10:30 AM Landmark Cars, 11:00 AM IRB Infra, 11:00 AM Lumax Inds, 11:00 AM Trucap Finance, 11:30 AM Vijaya Diagnostic, 12:00 PM Banswara Syntex, 12:00 PM EIH, 2:00 PM Allcargo, 2:00 PM AssocAlcohols, 2:00 PM Lumax Auto Tech, 3:00 PM Camlin Fine, 3:00 PM Eldeco Housing, 3:00 PM Oriental Aromatics, 3:30 PM Borosil, 3:30 PM Marksans Pharma, 3:30 PM Royal OrchHotel, 4:00 PM Advanced Enzyme, 4:00 PM CAMPUS ACTIVE, 4:00 PM Global Health, 4:00 PM Grasim, 4:00 PM Hinduja Global, 4:00 PM ISGEC Heavy Eng, 4:00 PM Somany Home Inn, 4:30 PM Bosch, 4:30 PM Neuland Lab, 5:00 PM Niyogin Fintech, 5:30 PM Bodal Chemicals, 6:00 PM TCNS Clothing
- **Five-Star Business Finance:** To meet investors and analysts on Feb. 14.
- **Radiant Cash Management Services:** To meet investors and analysts on Feb. 14 and 15.
- **UltraTech Cement:** To meet investors and analysts on Feb. 14.

## Market in Detailed (Updated at 8AM)

Indian Indices	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Sensex	60431.84	250.86	0.41	0.12	0.28	1.93	7.14
Nifty	17770.90	85.60	0.48	0.04	1.03	3.05	5.51
BSE M Cap	24580.36	310.08	1.25	0.21	2.35	3.53	5.05
BSE S Cap	27932.15	330.90	1.17	0.24	3.21	3.87	1.57
Nifty MC 100	30565.35	464.10	1.50	0.34	2.44	2.66	7.03
BSE Auto	30199.07	185.84	0.61	1.08	2.64	0.99	19.91
BSE Capgoods	34747.25	193.06	0.56	1.72	1.75	4.70	26.19
BSE FMCG	16402.72	6.91	0.04	1.57	2.59	2.52	25.14
BSE Metal	20035.70	30.88	0.15	2.50	6.69	2.00	0.15
BSE Oil&Gas	17483.41	82.64	0.47	0.93	15.21	12.44	1.70
BSE Healthcare	22293.53	147.46	0.66	0.36	3.35	6.28	6.54
BSE Power	3479.10	21.54	0.62	2.99	21.44	27.88	7.42
BSE Realty	3267.46	59.02	1.77	0.02	3.90	9.46	5.95
BSE ConsDur	38640.56	0.89	0.00	0.10	0.13	7.07	5.89
BSE Bank	46672.75	328.85	0.70	0.28	3.09	2.88	10.56
BSE IT	30153.19	578.93	1.88	0.28	4.14	0.68	10.40

LME	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Gold(\$/Ounce)	1856.67	3.16	0.17	0.88	3.31	4.81	0.78
Silver(\$/Ounce)	21.95	0.05	0.22	1.02	9.56	0.17	7.96
Aluminium	2378.75	25.99	1.08	4.77	7.31	2.74	24.40
Copper	8916.50	87.74	0.99	0.89	2.75	4.88	9.88
Zinc	3127.00	67.25	2.20	1.17	6.61	2.72	13.64
Lead	2087.50	18.75	0.91	0.01	8.08	3.60	8.71

Currency	Rate	Net Chng	%1D	%5D	%1M	%3M	%1Y
INR	82.73	0.22	0.27	0.01	1.68	1.77	8.61
USD Index	103.21	0.13	0.13	0.21	0.99	3.23	7.09
YUAN	6.82	0.00	0.04	0.46	1.14	3.71	6.73
GBP	1.21	0.00	0.02	0.74	0.47	3.24	10.28
EUR	1.07	0.00	0.03	0.00	0.89	3.86	5.14
YEN	132.19	0.24	0.18	0.84	2.72	5.83	12.59

Agro Commodities	Price	Net Chng	%1D	%5D	%1M	%3M	%1Y
Coffee	176.75	2.10	1.20	0.54	15.86	5.52	26.42
Cotton	85.31	0.50	0.58	1.26	3.26	3.38	12.43
Sugar	19.68	0.36	1.80	0.92	6.90	5.81	12.14
Wheat	798.50	2.25	0.28	4.89	6.18	5.98	0.16
Soybean	1533.75	2.25	0.15	1.56	0.43	5.70	9.42

Global Indices	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Dow Jones	34245.93	376.66	1.11	1.05	0.17	2.11	0.93
Nasdaq	11891.79	173.67	1.48	0.04	7.33	6.21	13.77
S&P 500	4137.29	46.83	1.14	0.64	3.46	4.55	6.01
FTSE100	7947.60	65.15	0.83	1.42	1.32	7.62	5.52
CAC40	7208.59	78.86	1.11	1.00	2.64	9.07	5.20
DAX	15397.34	89.36	0.58	0.34	2.06	7.57	1.87
Mexico IPC	53050.83	568.81	1.08	1.85	0.98	2.44	1.37
Brazil Bovespa	108836.5	758.20	0.70	0.11	1.87	3.82	4.44
Russian RTS	965.86	6.09	0.63	4.10	4.41	17.45	32.27
Japan Nikkei	27586.95	159.25	0.58	0.36	5.62	1.35	1.87
Hang Seng	21154.01	26.94	0.13	0.76	2.77	19.96	13.92
Taiwan Index	15636.59	92.53	0.60	1.53	5.48	10.31	13.12
Shanghai Comp	3291.75	7.51	0.23	1.34	3.02	6.75	4.00
KOSPI	2470.43	18.58	0.76	0.80	3.57	0.14	8.62
Malaysia KLCI	1477.83	2.39	0.16	0.08	1.17	0.93	6.71
Jakarta Comp	6932.87	35.33	0.51	0.00	4.42	1.20	2.98
Philippine SE	6853.42	13.87	0.20	0.42	1.42	7.83	6.91
Thai Exch	1664.89	0.32	0.02	1.02	1.00	2.56	1.18

Freight	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Baltic Dry	616.00	14.00	2.33	1.32	34.88	53.51	68.95
Baltic Dirty	1204.00	2.00	0.17	1.63	16.68	36.83	74.49
SG Dubai HY	25.48	2.40	10.40	18.81	23.37	24.22	638.25

Energy Markets	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
NYMEX Crude	79.22	0.91	1.14	2.71	0.79	7.73	17.00
BRENT Crude	85.92	0.68	0.79	2.68	0.44	3.96	2.65
Natural Gas	2.44	0.03	1.29	5.73	23.78	54.97	41.24

Bond Markets	Yield	Net Chng	%1D	%5D	%1M	%3M	%1Y
US	3.71	0.00	0.10	0.87	5.76	3.85	86.44
UK	3.40	0.01	0.18	4.87	1.07	1.31	120.19
Brazil	6.34	0.03	0.44	2.87	10.10	1.00	24.78
Japan	0.50	0.01	1.76	0.20	1.95	105.74	130.28
Australia	3.76	0.00	0.00	4.53	4.68	0.13	75.82
India	7.37	0.00	0.03	0.29	0.89	0.78	9.96
Switzerland	1.42	0.01	0.43	8.40	26.36	28.65	330.00
Germany	2.37	0.00	0.17	3.14	9.23	9.63	697.31

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- **Maruti Suzuki India/ South Indian Bank:** The automobile major has signed an MoU with the bank to offer dealer finance options and customised auto retail financing solutions for customers.
- **HeidelbergCement India:** The board approved the appointment of Joydeep Mukherjee as managing director of the company for a term of three years, effective April 1, 2023.

### **Stocks Extend Advance in Asia as Traders Await CPI**

Shares climbed in Asia following a rally on Wall Street as investors position for US inflation data later Tuesday that might not be as bad as once feared. Stocks advanced across most of the region, putting an Asia equity gauge on course to snap a two-day losing streak. Shares fluctuated in Hong Kong and on the mainland after an index of US-listed Chinese stocks earlier jumped by the most in almost two weeks. The S&P 500 added 1.1% and the tech-heavy Nasdaq 100 climbed 1.6% after a survey showed Americans drastically reduced their expectations for household income growth amid tighter monetary policy. Investors will be focused as well on the nomination of the next Bank of Japan governor as bets increase that yield-curve control and negative-rate policy may be abolished soon under the new leadership of Kazuo Ueda. The benchmark 10-year yield is sitting hard against the BOJ's 0.5% ceiling.

### **Oil Retreats on US Plan to Sell More Oil from Strategic Reserve**

Oil fell on a US plan to sell more crude from its reserves, offsetting a lift from Russian output cuts and rising Chinese demand. West Texas Intermediate dropped toward \$79 a barrel after a volatile session on Monday. The US is looking to sell 26 million barrels from the Strategic Petroleum Reserve in accordance with a budget mandate enacted in 2015.

### **US to Sell Strategic Oil Despite Biden's Push to Halt Sales**

The Biden administration plans to sell more crude oil from the Strategic Petroleum Reserve, fulfilling budget directives mandated years ago that it had sought to stop as oil prices have stabilized. The congressionally mandated sale will amount to 26 million barrels of crude, according to people familiar with the matter. The sale is in accordance with a budget mandate enacted in 2015 for the current fiscal year, said a spokesperson for the Department of Energy. The Energy Department has sought to stop some of the sales required by 2015 legislation so that it can refill the emergency reserve, which currently has about 371 million barrels. After this latest release, the reserve will dip to about 345 million.

### Auto / Auto Ancillaries

['Trying my best to convince Finance Ministry': Nitin Gadkari on GST benefits for Hybrid technology](#)

[Yamaha bikes to be E20-compliant by end of this year; drives in new range with traction control system](#)

[Ola Electric 2023: Teased five new electric bikes, here's all you need to know](#)

[Strong demand, better supply push passenger vehicle sales up 17% in January](#)

[CV sales in India likely to rise 9-11% next fiscal: Crisil Ratings](#)

[Nissan, Renault to invest \\$600 million to make new models in India](#)

[Toyota's CEO-to-be outlines leadership team bullish on EVs](#)

[Audi weighs local assembly of electric vehicles](#)

### Banking & Finance

[RBI, Yes Bank move SC against HC order setting aside ₹8.4k cr AT-1 bonds writeoff](#)

[HDFC Bank begins offline payment pilot under RBI sandbox](#)

[RBI cancels registration of two entities for regulatory lapses](#)

[Srei insolvency: Kanorias' offer to pay off dues rejected under technical ground](#)

[Optimum net interest margin for NBFC-MFIs should be 11-11.5%: Fusion Microfinance MD](#)

[Total exposure of 5 state-run general insurers in Adani group at Rs 347 cr: MoS Finance](#)

[Billionaire Uday Kotak's Kotak Mahindra Bank weighs insurance unit stake sale, sources say](#)

### FMCG/Retail/Textiles/Agri

[ITC expects to sell more than Rs 2k-cr worth raw tobacco to BAT in FY24](#)

[India is among fastest growing markets for Mars Wrigley: Kalpesh R Parmar](#)

[Virtual Forest, Redler Technologies awarded GITA grant to develop motor controllers for e-rickshaws](#)

[Welspun One Logistics Parks inks pact with UP govt to invest Rs 2,000 cr](#)

[MediaTek unveils Helio G36 chip to power gaming smartphones in India](#)

[Apple supplier Salcomp to double workforce in India, targets revenue of \\$2-\\$3 bn by 2025](#)

[Lux Industries to achieve turnover of Rs 1,000 crore by FY26](#)

### Infrastructure/Cement/Real Estate

[DPIIT considering quality control norms for certain building materials](#)

### Oil & Gas

[Over Rs 5,100 crore outlay for 2 schemes in petroleum sector: Rameswar Teli](#)

[Reliance seeks \\$12.75 for CBM gas, ONGC wants \\$9.35](#)

### Metals/Mining/Power

[Financial year ending, but power tariff for Delhi yet to be announced](#)

[ReNew Power rebrands itself as 'ReNew', adds decarbonization solutions to its portfolio](#)

[Govt to initiate closure of SAIL's steel unit in Bhadravathi: MoS Finance](#)

[JSW Steel crude steel output surges 15 pc in Jan](#)

### IT/Telecom/Media

[Vodafone Idea in talks to refinance Rs 3,000-4,000 crore of loans](#)

[DoT starts doling out production-linked incentives, GX Telecom gets first cheque](#)

### Pharma/Fertilizers/Healthcare/Chemicals

[Government steps up efforts to drive innovation in pharmaceutical sector](#)

[India's healthcare sector witnessing big, positive changes: PM writes to Varanasi cataract camp beneficiaries](#)

[QR code-based OPD registration implemented in over 300 hospitals, reducing waiting time drastically](#)

[AI won't replace doctors, human touch needed in healthcare: Apollo Group JMD](#)

[Natco Pharma submits application with USFDA for generic cancer drug](#)

### Hospitality/Aviation

[Air passenger traffic to further rise in 2023: Union minister Kishan Reddy](#)

[Boeing launches global support centre in India; to set up logistics centre](#)

[Govt working to create aviation hub in India: V K Singh](#)

[Mumbai airport records surge in passenger movement, traffic up by 149% in Jan](#)

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Buy: Return >15%, Accumulate: Return between 5% to 15%, Reduce: Return between -5% to +5%, Sell: Return < -5%

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