

Current Market Scenario

14th Dec 2024

CAPSTOCKS



CAPSTOCKS

NIFTY NEXT 50 - 1D - INDICES O 73026.70 H 73068.20 L 71711.50 C 72965.95 -116.65 (-0.16%)



Activate Windows
Go to Settings to activate Windows.

CAPSTOCKS



CAPSTOCKS

NIFTY SMLCAP 250 - 1D - INDICES - O 18294.90 H 18298.35 L 17954.80 C 18263.75 -66.55 (-0.36%)



Activate Windows

CAPSTOCKS

NIFTY 50 • 1D • INDICES  O 24501.20 H 24790.20 L 24180.80 C 24782.15 +233.45 (+0.95%)



Activate Windows
Go to Settings to activate Windows.

Avanti Feeds

CAPSTOCKS

- Largest manufacturer of Shrimp feeds, exporter of processed shrimp
- Technical collaboration with Thai Union
- To diversify into Pet Care business, fish feed
- Strong balance sheet with 2000 Cr. Cash

Investment Rational

CAPSTOCKS

- Fish meal, Soya Doc, Wheat are three major raw material for feed business
- Fish meal prices are falling due to good catches in Chile and Peru
- Soya Doc prices down sharply due to good domestic harvest , higher soya oil prices and competition from ethanol converted maize residue
- Margins are expected to improve in feed business
- Shrimp business expected to see cyclical recovery

Markets Rebounds

CAPSTOCKS

- FPI selling reduced
- US markets at All Time High
- Volatile commodity market
- Retail confidence intact

INDEX WATCH

INDEX	13 th Dec	9 th Nov	% Change
Nifty	24,768	24,148	+ 2.5
Sensex	82,133	79,486	+ 3.3
Nifty Midcap	58,991	56,352	+ 4.6
BSE Small Cap	56,957	54,852	+ 3.8

FPI Cash Market Flows **CAPSTOCKS**

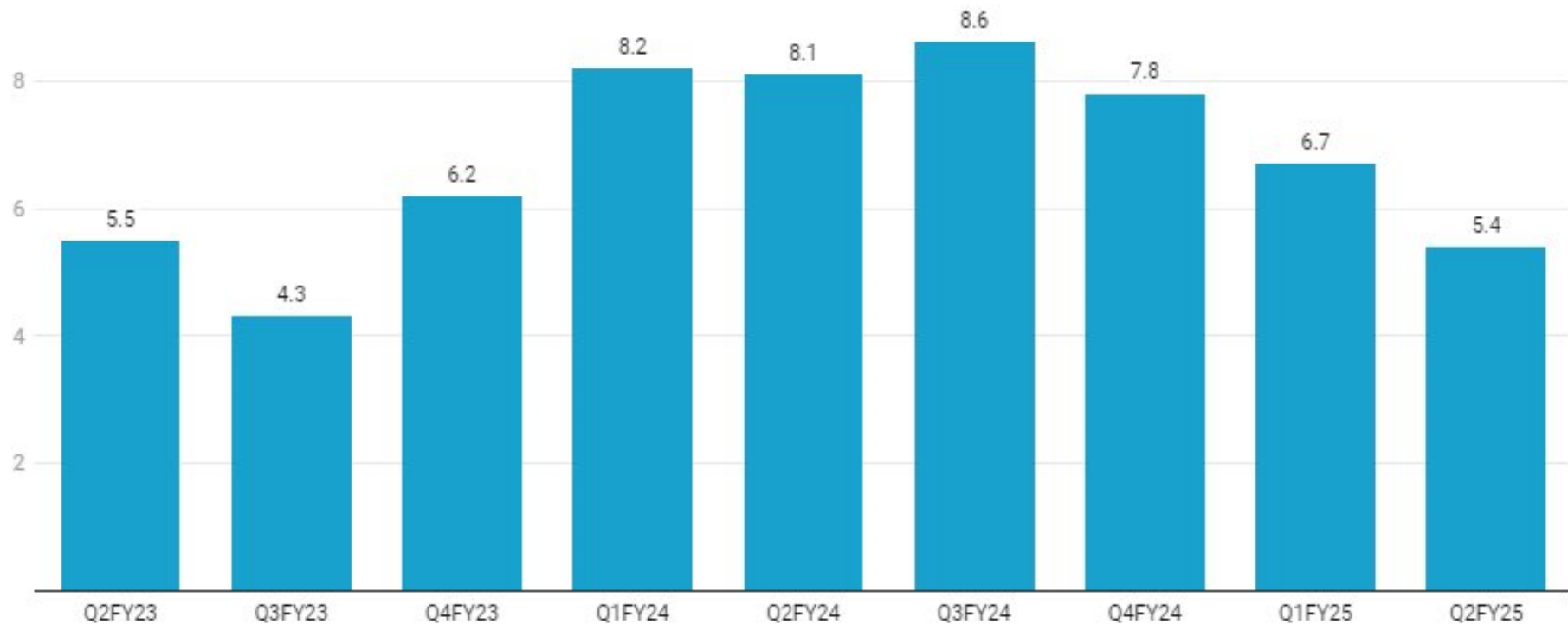
2024	Net Flows Cr.
Dec*	+ 9371
Nov	- 45,974
Oct	- 1,14,445
Sep	+ 15,423
Aug	- 21368
July	+ 5407
June	+ 2037
May	- 42,214
April	- 35,692

* Till Dec 12th

GDP Growth Slows Sharply CAPSTOCKS

GDP growth slips to a seven quarter low

(% change, y-o-y)



Source: MoSPI • Created with [Datawrapper](#)

The September growth was well below the MC poll of 11 economists, which pegged median growth at 6.5 percent, with forecasts ranging from 6.2 to 6.8 percent.

Q2 GDP Growth – Sectoral Growth

Sectoral Growth (% y-o-y)

	Q3 FY24	Q4 FY24	Q1 FY25	Q2 FY25
Agriculture, forestry & fishing	0.4	0.6	2.0	3.5
Industry	10.5	8.4	8.3	3.6
Mining & quarrying	7.5	4.3	7.2	-0.1
Manufacturing	11.5	8.9	7.0	2.2
Electricity, gas, water supply & other utility services	9.0	7.7	10.4	3.3
Construction	9.6	8.7	10.5	7.7
Services	7.1	6.7	7.2	7.1
Trade, hotels, transport, communication & broadcasting	6.9	5.1	5.7	6.0
Financial, real estate & professional services	7.0	7.6	7.1	6.7
Public administration, defence and other services	7.5	7.8	9.5	9.2
GVA (at basic price)	6.8	6.3	6.8	5.6

Source: MOSPI

Capital Expenditure Drops Sharply

Centre's account

(April-October/in ₹ crore)

Head	2024-25	2023-24	% change
Revenue receipts	17,04,267	15,67,722	8.71
Tax revenue	13,04,973	13,01,957	0.23
Non-tax revenue	3,99,294	2,65,765	50.24
Non-debt capital receipts	18,807	22,990	-18.19
Total receipts	17,23,074	15,90,712	8.32
Revenue expenditure	20,07,353	18,47,488	8.65
Capital expenditure	4,66,545	5,46,924	-14.7
Total expenditure	24,73,898	23,94,412	3.32
Fiscal deficit	7,50,824	8,03,700	-6.58

Source: CGA

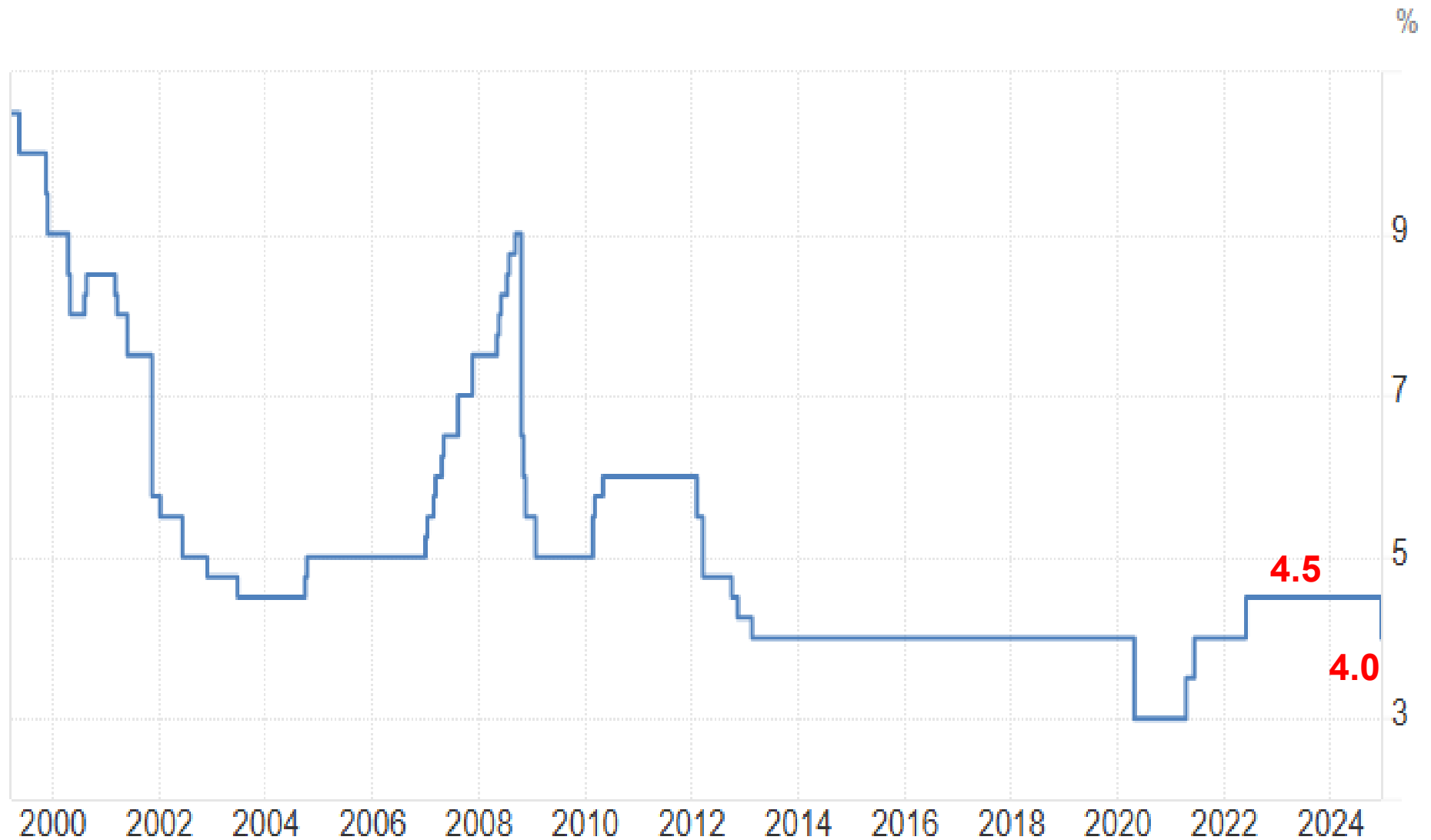
RBI Action

CAPSTOCKS

- RBI cuts CRR by 50 basis points
- Keeps Repo Rate unchanged
- Cuts GDP growth from 7.2% to 6.6% for FY25
- Can expect 25 basis points Rate Cut from RBI in Q4 FY'25
- Sanjay Malhotra appointed as new RBI Governor

Historical CRR

CAPSTOCKS



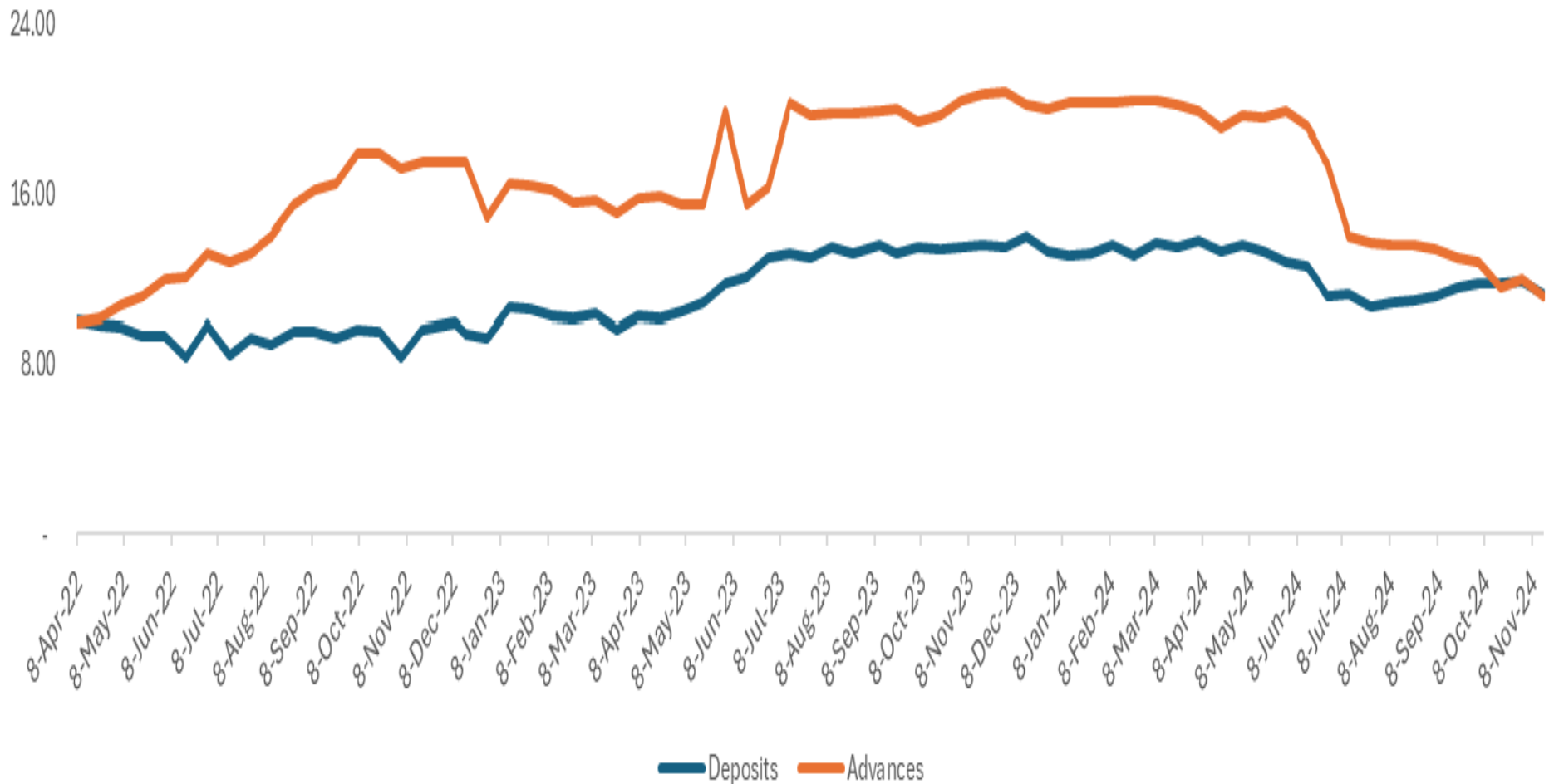
RBI Inflation Outlook

CAPSTOCKS

RBI's Inflation Outlook (%)					
	FY25	Q3 FY25	Q4 FY25	Q1 FY26	Q2 FY26
Dec-24	4.8	5.7	4.5	4.6	4
Earlier Oct-24	4.5	4.8	4.2	4.3	--

Bank Advances Growth Fall Sharply

Growth, YOY, %. Source: RBI, CNBCTV18



Q2 Results

CAPSTOCKS

- Lacklustre Q2 performance reflected in GDP growth
- Recovery in second half of FY25 expected

Q2 Result Performance

SALES	Q2FY24	Q2FY25	YoY
NIFTY 50	1487991	1624600	9%
NIFTY NEXT 50	524041	579880	11%
PAT	Q2FY24	Q2FY25	YoY
NIFTY 50	177671	182939	3%
NIFTY NEXT 50	52040	55890	7%
PAT MARGIN	Q2FY24	Q2FY25	YoY
NIFTY 50	11.9%	11.3%	-0.7%
NIFTY NEXT 50	9.9%	9.6%	-0.3%

Primary Market Will Remain Active

IPO Frenzy

Amount (in ₹ crore) raised through IPOs*, yearly

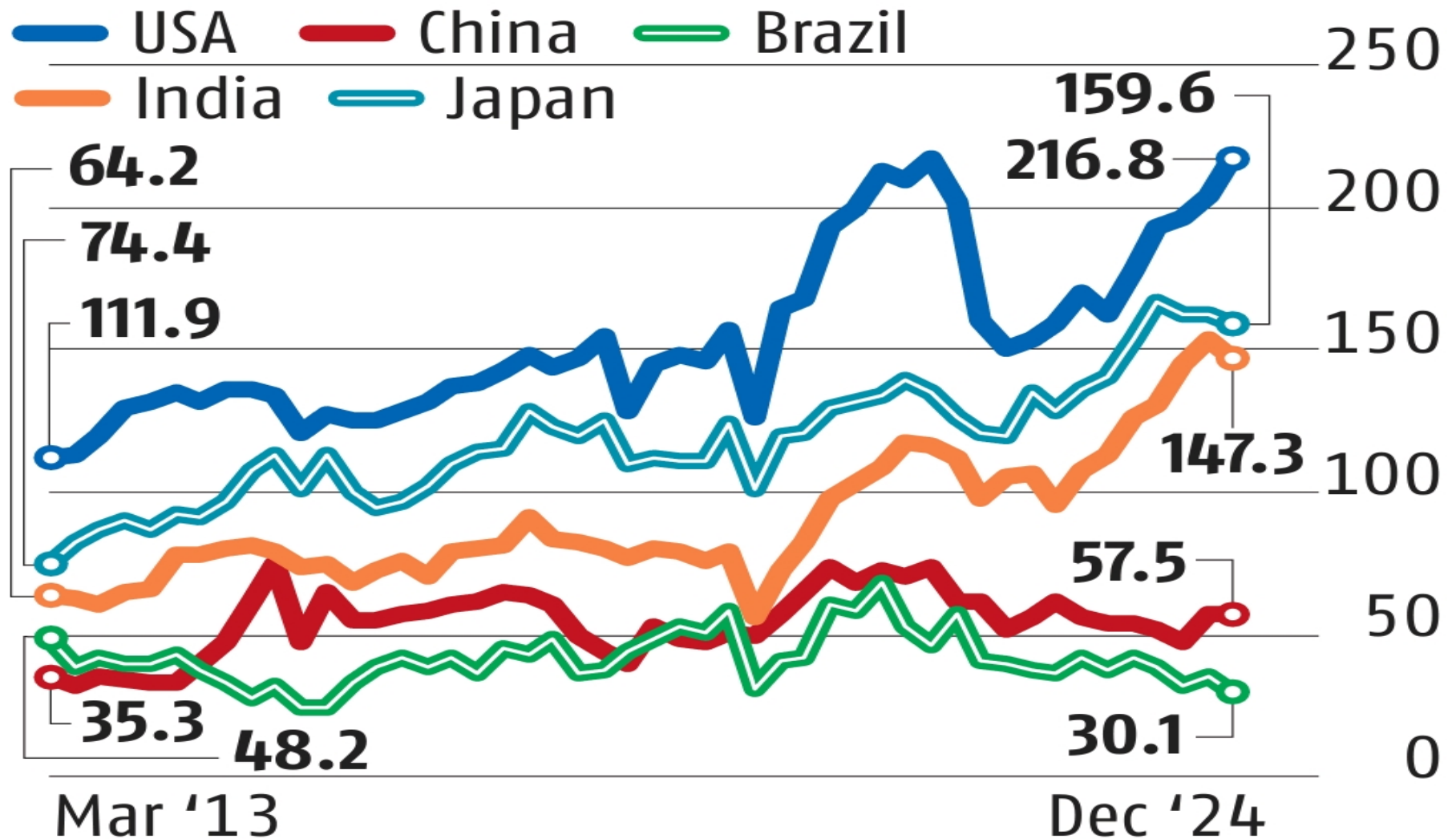
mint



*includes both main-board and SMEs. Latest data as on 26 November 2024.

Source: primedatabase.com

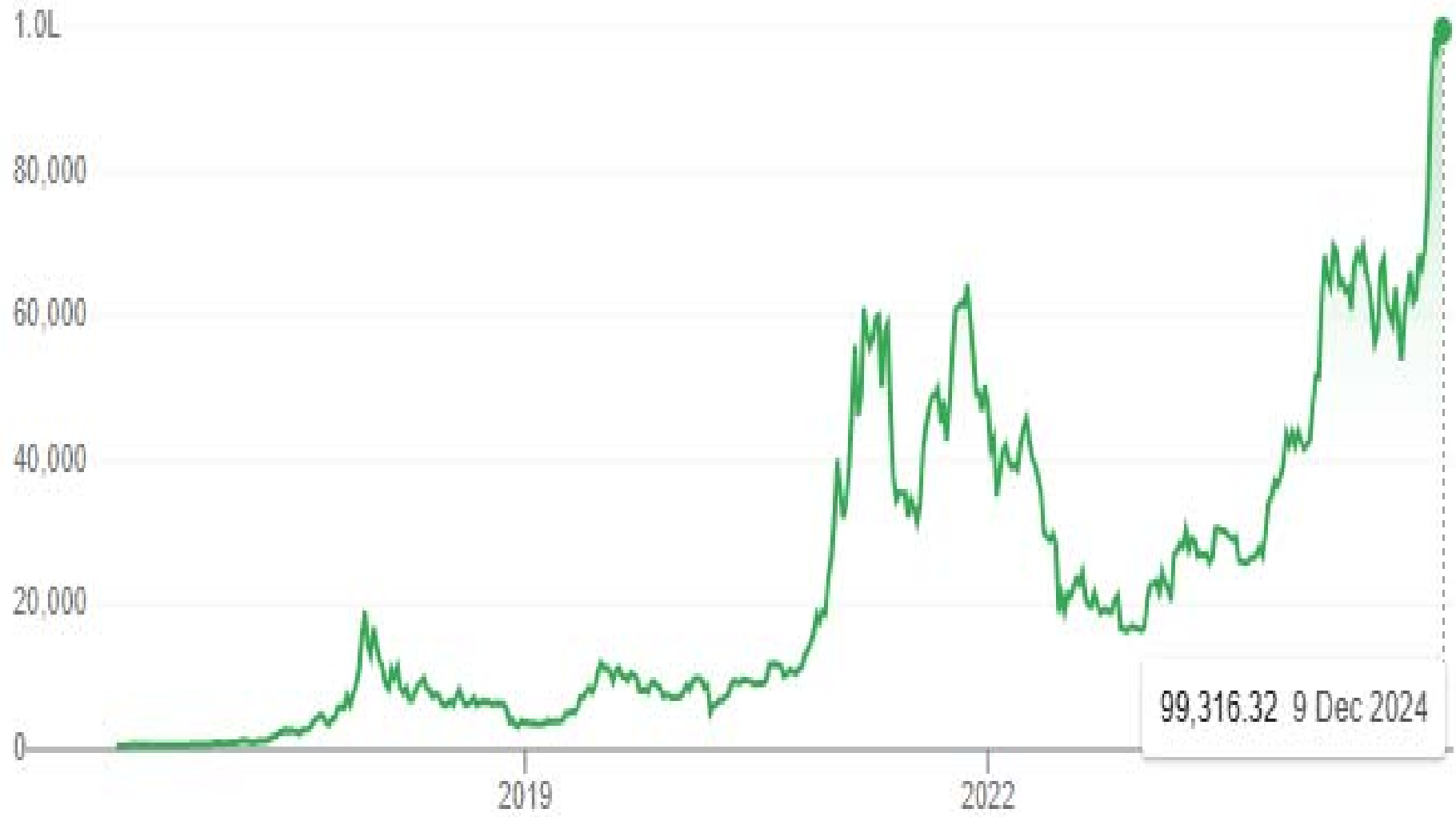
Market Cap To GDP Ratio CAPSTOCKS



Data till Dec 3, 2024; Sources: BSE, Bloomberg, RBI, *Business Standard* calculation
Compiled by BS Research Bureau

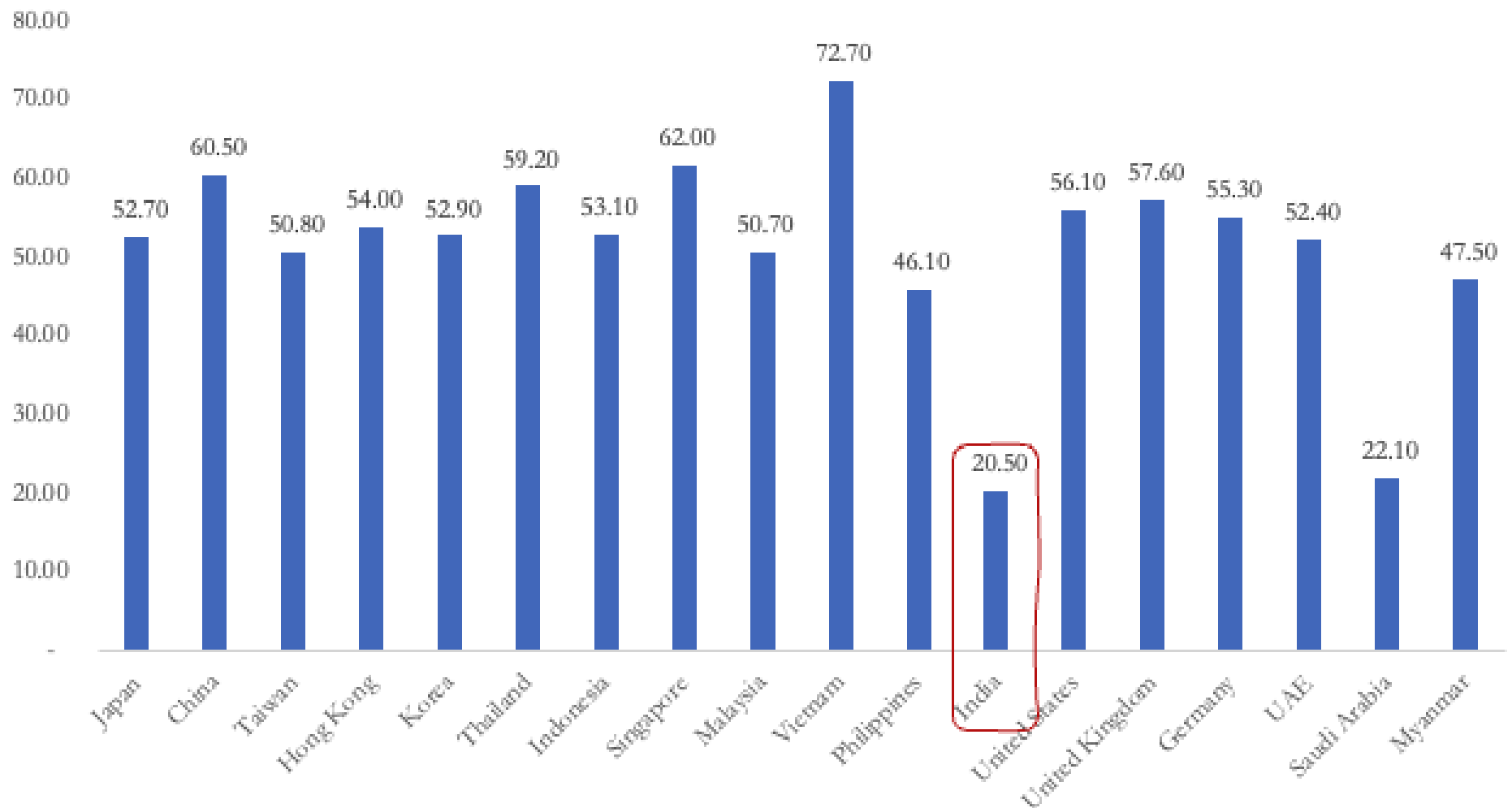
1 Bitcoin = \$1 Lakh

CAPSTOCKS



India lags among Other Countries

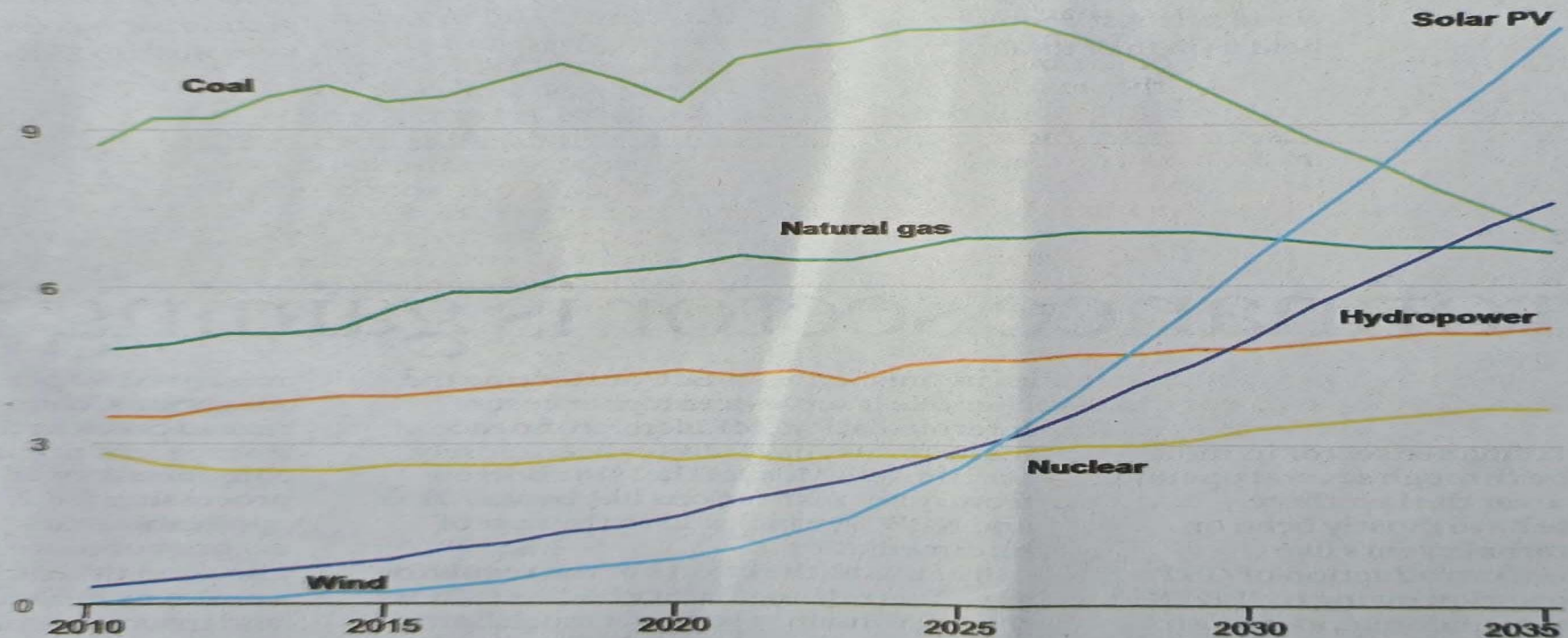
Female Labour Force Participation of Major Economies



World Electricity Generation 2010-35

GREEN SCREEN

thousand TWh
12



World electricity generation — 2010-35

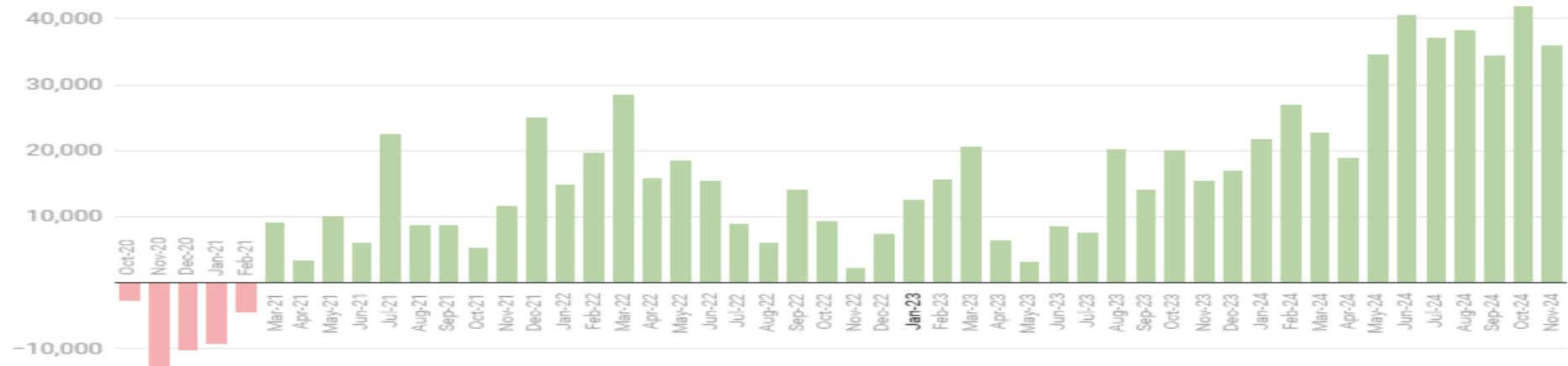
Data from the International Energy Agency shows that global coal- and solar-based electricity generation will be roughly the same around 2032, at around 8,100 terawatt-hour (TWhr). Solar generation is expected to rise from 2,100 TWhr in 2024 to 10,700 TWhr; wind from 2,600 to 7,500; coal 10,800 to 7,000; natural gas 6,700 to 6,600, hydro 4,500 to 5,200; and nuclear 2,800 to 3,700

Mutual Fund Flows

CAPSTOCKS

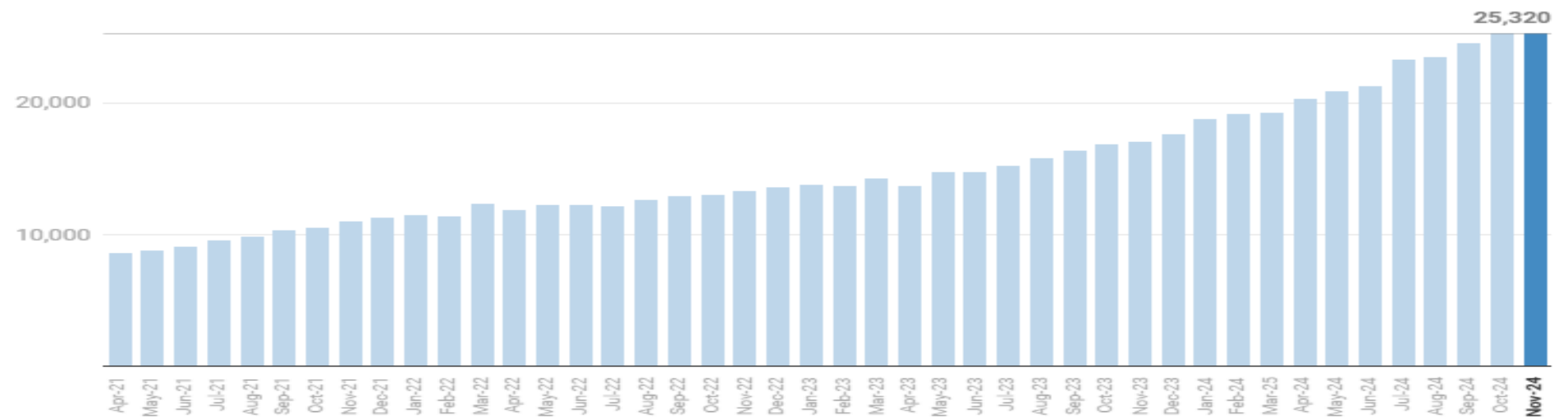
Net Equity Inflows

(Rs crore)



SIP Contribution

Gross investments (Rs crore)



Events To Watch

CAPSTOCKS

- FPI Action
- US Fed outcome on 18th Dec

Thank You