

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,014.55	74,022.30	74,099.78	73,743.77	73,903.91	-110.64	-0.15
NIFTY	22,462.00	22,458.80	22,497.60	22,388.15	22,453.30	-08.70	-0.04

CHOPPY SESSION CLOSE ON A FLAT NOTE

The 30-share BSE Sensex was down by 110.64 points or 0.15% to settle at 73,903.91 and the Nifty was down by 8.70 points or 0.04% to settle at 22,453.30. The BSE Mid Cap was up by 1.14% and BSE Small Cap was up by 1.28%. On the sectoral front, Consumer Durables, Oil & Gas, Realty, Metal, Capital Goods, FMCG, Healthcare, and Auto were gaining indices; on the flipside, Bank and IT were losing indices. Mahindra & Mahindra, Nestle, Tata Motors, SBIN and IndusInd Bank were the top gainers on the Sensex; on the flip side, Kotak Bank, HCL Tech, ICICI Bank, Sunpharma and Infosys were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
TATACONSUM	1,130.95	1,086.90	4.05
M&M	1,970.00	1,915.95	2.82
BPCL	616.20	600.70	2.58
BAJAJ-AUTO	9,271.05	9,042.15	2.53
ADANIPTS	1,402.85	1,375.90	1.96

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
HEROMOTO	4,566.95	4,680.75	-2.43
KOTAKBANK	1,756.70	1,790.70	-1.90
HCLTECH	1,531.95	1,556.70	-1.59
ICICIBANK	1,083.15	1,099.65	-1.50
SBILIFE	1,469.30	1,489.95	-1.39

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,06,12,723	1,479.55	3,057.32
ICICIBANK	1,43,80,396	1,083.15	1,557.94
AXISBANK	1,36,17,893	1,050.00	1,424.70
LT	36,08,162	3,811.80	1,369.38
RELIANCE	44,55,083	2,977.00	1,320.77

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	6,95,33,405	164.60	1,139.3
HDFCBANK	2,06,12,723	1,479.55	3,057.2
SBIN	1,57,13,063	765.95	1,196.7
ONGC	1,44,39,120	272.55	392.44
ICICIBANK	1,43,80,396	1,083.15	1,557.9



NEWS BULLETIN

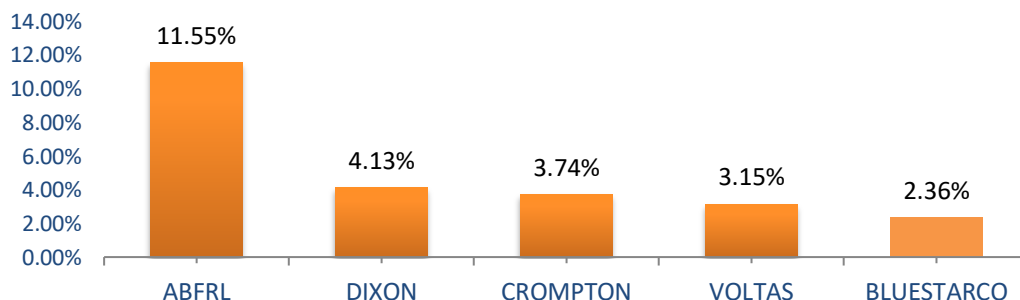
- **Jammu & Kashmir Bank** has signed Corporate Agency Agreement with New India Assurance Company for servicing and soliciting their insurance products through its Branch Network.
- **Sterlite Technologies (STL)** has been awarded orders worth around Rs 900 crore in FY24 to provide integrated optical solutions to the leading service providers in the country.
- **Maruti Suzuki India's** production rose 8.16% to 166,730 units in March 2024. The company had a total production of 154,148 units in the same month a year ago.
- **Mahindra & Mahindra's** wholly-owned dropdown subsidiary - MASPL has signed a multi-year contract with Airbus Atlantic for the manufacture and delivery of metallic components and small assemblies, for the entire Airbus commercial aircraft family, including the best-selling A320 family.
- **Gandhar Oil Refinery (India)** has received a work order worth of Rs 15.20 crore from BESCO for the purpose of supply of New Insulating Oil Uninhibited (U) Type- II Transformer Oil.

After scaling new highs in yesterday's session, Indian equity benchmarks witnessed weak trade on Tuesday amid profit booking. Besides, investors preferred to play safe ahead of RBI MPC meeting from April 3 to April 5. GST collection data and HSBC India Manufacturing Purchasing Managers' Index (PMI) data failed to cheer the markets. After making cautious start, markets turned volatile for little time tracking weakness on Wall Street overnight as hopes of an early rate cut suffered fresh jolt after data showed that the US manufacturing sector grew for the first time since September 2022. Besides, foreign fund outflows dampened investor's sentiments. Further, indices added losses in afternoon session, as traders overlooked manufacturing PMI data. India's manufacturing sector continued to show a stellar performance, with the HSBC India PMI climbing to a 16-year high on the back of the strongest increases in output and new orders since October 2020, parallel to the second-sharpest upturn in input inventories in the history of the survey. According to the survey report, the seasonally adjusted HSBC India PMI rose to 59.1 in March as against 56.9 in February.

On the global front, European markets were trading higher as strong U.S. manufacturing data helped lift mining and energy stocks. Also, British manufacturers reported their first overall growth in activity in 20 months in March on the back of recovering demand in their home market.

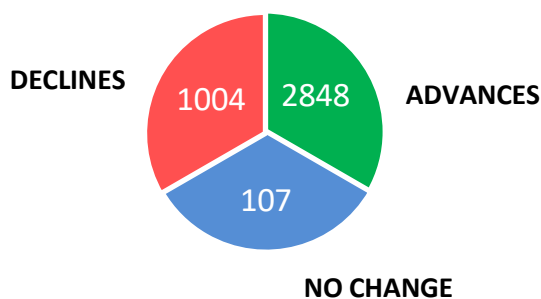
Source: AceEquity

MARKET DRIVING SECTOR : CONSUMER DURABLES

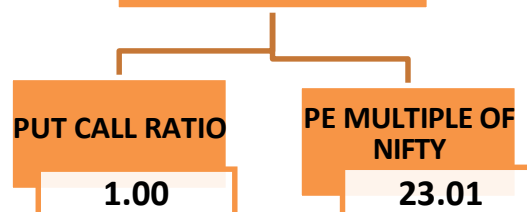


S&P BSE: CONSUMER DURABLES
CLOSING: 53,201.56
CHANGE: +950.79
% CHANGE: +1.82%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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