



| Index | Previous Close | Open | High | Low | Close | Change | Change% |
|--------|----------------|-----------|-----------|-----------|-----------|--------|---------|
| SENSEX | 73,903.91 | 73,757.23 | 74,151.21 | 73,540.27 | 73,876.82 | -27.09 | -0.04 |
| NIFTY | 22,453.30 | 22,385.70 | 22,521.10 | 22,346.50 | 22,434.65 | -18.65 | -0.08 |

INDICES CLOSED FLAT AMID WEAK GLOBAL CUES

The 30-share BSE Sensex was down by 27.09 points or 0.04% to settle at 73,876.82 and the Nifty was down by 18.65 points or 0.08% to settle at 22,434.65. The BSE Mid Cap was up by 0.61% and BSE Small Cap was up by 1.18%. On the sectoral front, IT, Oil & Gas, Bank and Capital Goods were gaining indices; on the flipside, Consumer Durables, Realty, FMCG, Metal, Auto and Healthcare were losing indices. NTPC, TCS, Tech Mahindra, Axis Bank and Bharti Airtel were the top gainers on the Sensex; on the flip side, Nestle, Kotak Bank, JSW Steel, Titan and Bajaj Finserv were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a positive note.

Top Gainers

| Name | Closing Pr. | Previous Pr. | %Ch |
|------------|-------------|--------------|------|
| SHRIRAMFIN | 2,556.00 | 2,465.95 | 3.65 |
| NTPC | 352.65 | 344.80 | 2.28 |
| DIVISLAB | 3,685.70 | 3,622.50 | 1.74 |
| TCS | 3,950.05 | 3,883.80 | 1.71 |
| TECHM | 1,256.50 | 1,236.80 | 1.59 |

Top Losers

| Name | Closing Pr. | Previous Pr. | %Ch |
|------------|-------------|--------------|-------|
| NESTLEIND | 2,555.00 | 2,623.30 | -2.60 |
| BAJAJ-AUTO | 9,090.00 | 9,276.10 | -2.01 |
| DRREDDY | 6,130.85 | 6,237.55 | -1.71 |
| KOTAKBANK | 1,733.00 | 1,757.40 | -1.39 |
| BRITANNIA | 4,836.00 | 4,899.95 | -1.31 |

MARKET STATS (NSE)

Most Active (by value)

| Name | Qty | Pr. | Value CR |
|-----------|-------------|----------|----------|
| HDFCBANK | 2,27,92,193 | 1,484.50 | 3,384.78 |
| KOTAKBANK | 1,26,83,551 | 1,733.00 | 2,202.85 |
| ICICIBANK | 1,54,77,184 | 1,077.35 | 1,669.20 |
| TCS | 39,73,090 | 3,950.05 | 1,565.58 |
| SBIN | 1,91,36,981 | 771.00 | 1,469.41 |

Most Active (by volume)

| Name | Qty | Pr. | Value CR |
|-----------|-------------|----------|----------|
| TATASTEEL | 5,09,38,559 | 163.60 | 839.16 |
| HDFCBANK | 2,27,92,193 | 1,484.50 | 3,384.7 |
| ONGC | 2,26,00,929 | 275.65 | 624.17 |
| NTPC | 2,16,79,943 | 352.65 | 755.05 |
| SBIN | 1,91,36,981 | 771.00 | 1,469.4 |



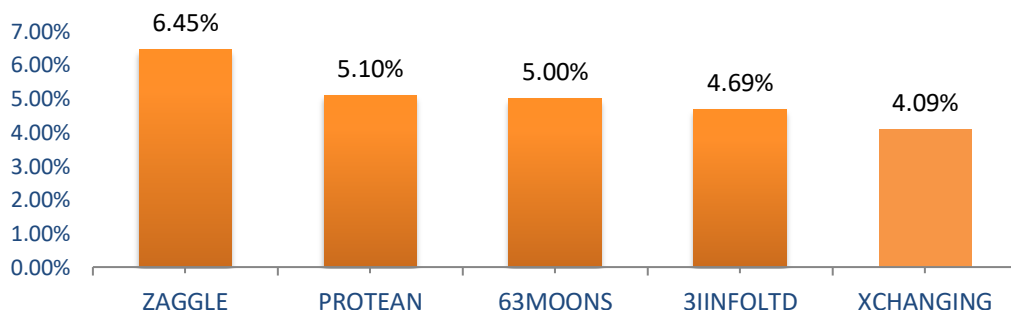
Indian markets ended Wednesday’s session slightly in red. Traders were cautious amid ongoing monetary policy committee (MPC) meeting. The Reserve Bank of India (RBI) is widely expected to keep rates unchanged for the seventh consecutive meeting. Markets made gap-down opening tracking weak cues from Wall Street overnight as well as lackluster trade in Asian counterparts, as strong US economic data sent Treasury yields higher and renewed concerns over the outlook for interest rates. However, further markets saw recovery to trade flat with positive bias, as traders took some support with report that the government has broadly met the tax collection target of over Rs 34.37 trillion for 2023-24 on the back of robust economic activity and improved compliance. The government had raised the target for direct tax collection in FY24 (April 2023 to March 2024) to Rs 19.45 trillion, while for indirect taxes (GST+ Customs + Excise) the target was lowered to Rs 14.84 trillion in the revised estimates (RE) presented in Parliament on February 1, 2024. In afternoon session, indices remained higher.

On the global front, European markets were trading mostly in green as investors awaited Eurozone inflation data and Fed Chair Jerome Powell's comments later in the day for further clues on the timing and speed of interest rate cuts. The BSE Sensex ended at 73,876.82, down by 27.09 points or 0.04%
Source: AceEquity

NEWS BULLETIN

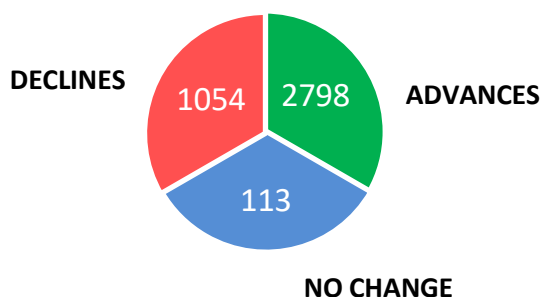
- **Thomas Cook (India)** has inaugurated a new branch in the high potential market of Bhuj with a strategic intent to capitalise on the strong and growing demand from Gujarat.
- **Tata Power** Company’s subsidiary Tata Power Renewable Energy’s (TPREL) subsidiary -- TP Saurya (TPSL) has successfully commissioned a 200MW solar project located in Bikaner, Rajasthan, for Tata Power Trading Company (TPTCL).
- **Tech Mahindra** has entered into a strategic partnership with AVEVA, a leading industrial software provider, driving digital transformation and sustainability for innovative business solutions, to establish a Center of Excellence (CoE).
- **IndiGo** has inked an initial pact with Malaysia Airlines for a codeshare partnership to boost connectivity between the two countries.
- **SJVN** has signed a memorandum of understanding (MoU) with the Indian Institute of Technology (IIT) Patna. The primary focus of the MoU is to develop cutting-edge methodologies to integrate diverse geotechnical data sources.

MARKET DRIVING SECTOR : IT

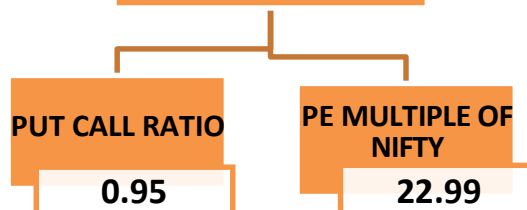


S&P BSE: IT
CLOSING: 35,891.94
CHANGE: +276.39
% CHANGE: +0.78%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



[For Disclosure & Disclaimer, click here](#)