

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,876.82	74,413.82	74,501.73	73,485.12	74,227.63	+350.81	+0.47
NIFTY	22,434.65	22,592.10	22,619.00	22,303.80	22,514.65	+80.00	+0.36

## INDICES SHUT THE DAY WITH MODERATE GAINS

The 30-share BSE Sensex was up by 350.81 points or 0.47% to settle at 74,227.63 and the Nifty was up by 80 points or 0.36% to settle at 22,514.65. The BSE Mid Cap was down by 0.11% and BSE Small Cap was up by 0.54%. On the sectoral front, IT, Consumer Durables, Auto, Healthcare, Metal, Bank and Capital Goods were gaining indices; on the flipside, Oil & Gas, Realty and FMCG were losing indices. HDFC Bank, Titan, Tech Mahindra, Asian Paint and TCS were the top gainers on the Sensex; on the flip side, SBIN, Bharti Airtel, JSW Steel, Powergrid and ITC 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
HDFCBANK	1,529.00	1,482.30	3.15
TITAN	3,785.00	3,712.50	1.95
TECHM	1,278.15	1,255.15	1.83
EICHERMOT	4,005.00	3,934.20	1.80
ASIANPAINT	2,920.95	2,869.35	1.80

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ONGC	269.50	275.35	-2.12
ADANIPTS	1,369.30	1,397.20	-2.00
SHRIRAMFIN	2,510.55	2,556.45	-1.80
BPCL	600.45	610.95	-1.72
BHARTIARTL	1,207.50	1,225.70	-1.48

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,44,67,533	1,529.00	6,761.96
ICICIBANK	2,14,19,689	1,080.55	2,301.57
KOTAKBANK	1,31,25,292	1,748.50	2,277.21
RELIANCE	72,45,136	2,931.00	2,118.77
AXISBANK	1,79,64,844	1,066.00	1,919.44

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	6,10,94,750	163.95	997.56
HDFCBANK	4,44,67,533	1,529.00	6,761.9
NTPC	2,89,62,927	355.70	1,034.0
ONGC	2,46,24,383	269.50	665.77
POWERGRID	2,37,22,104	277.85	664.50



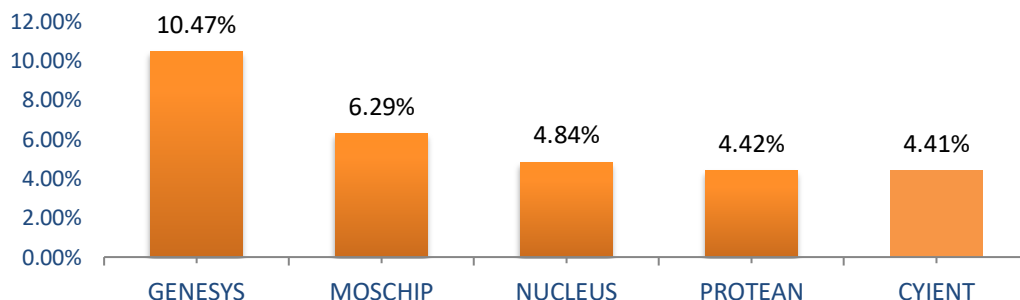
In volatile trading session, Indian equity markets concluded Thursday's trade in green aided by positive India's Services PMI data. Indices also witnessed some weakness during the day, as traders avoided to take position with their focus towards monetary policy outcome. Indices made optimistic start tracking strong global cues. Investors took support as CBIC chairman Sanjay Kumar Agarwal said the indirect tax collection for FY24 has exceeded the revised estimates (RE) of Rs 14.84 trillion by "a handsome margin", helped by a record GST mop-up. Tax collection is a reflection of economic activity. Further in afternoon session, indices managed to recoup their losses, after data showing that India's services activity continued to expand in March, with the HSBC Purchasing Managers' Index (PMI) for the sector coming in at 61.2. Rising from 60.6 in February to 61.2 in March, the seasonally adjusted HSBC India Services Business Activity Index pointed to one of the strongest growth rates seen in over 13-and-a-half years. The upturn was largely attributed to healthy demand conditions, efficiency gains and positive sales developments.

On the global front, European markets were trading higher with investors awaiting an inflation print and minutes from the European Central Bank's latest meeting. Asian markets ended in green with China, Taiwan and Hong Kong markets closed for a public holiday. Source: AceEquity

## NEWS BULLETIN

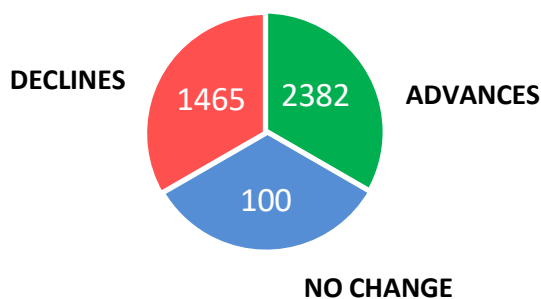
- **LTIMindtree** has entered into strategic partnership with Aforza to deliver digital transformation in CRM & TPM across the consumer products industry. The partnership between Aforza and LTIMindtree is set to support the front office operations of Consumer Products manufacturers and distributors.
- **M&M** has unveiled the name of its much-anticipated SUV, the XUV 3XO (pronounced as XUV-three-exoh). Its global debut on April 29 will set a new precedent in the category, embodying the sophistication and modern technology that the XUV brand DNA is celebrated for.
- **Synergy Green Industries** has finalized land acquisition deal at MIDC Kagal, Kolhapur (which is 5 Km from present facilities).
- **Aster DM Healthcare** has completed the separation of its India and GCC businesses. Under the separation plan, a consortium of investors led by Fajr Capital, a sovereign-backed private equity firm, has acquired a 65% stake in Aster GCC, with the Moopen family retaining a 35% stake alongside management and operational rights.

## MARKET DRIVING SECTOR : IT

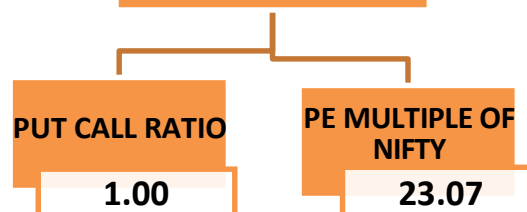


**S&P BSE: IT**  
**CLOSING: 36,224.16**  
**CHANGE: +332.22**  
**% CHANGE: +0.93%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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