

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,399.78	72,892.14	73,135.43	72,685.03	72,943.68	-456.10	-0.62
NIFTY	22,272.50	22,125.30	22,213.75	22,079.45	22,147.90	-124.60	-0.56

INDICES SHUT THE DAY IN RED NOTE

The 30-share BSE Sensex was down by 456.10 points or 0.62% to settle at 72,943.68 and the Nifty was down by 124.60 points or 0.56% to settle at 22,147.90. The BSE Mid Cap was up by 0.05% and BSE Small Cap was up by 0.57%. On the sectoral front, Oil & Gas, FMCG, Healthcare, Auto and Consumer Durables were gaining indices; on the flipside, IT, Metal, Realty, Capital Goods and Bank were losing indices. Titan, Hindustan Unilever, HDFC Bank, Maruti and Powergrid were the top gainers on the Sensex; on the flip side, Infosys, IndusInd Bank, Wipro, Bajaj Finserv and HCL Tech 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 negative note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
EICHERMOT	4,348.00	4,219.35	3.05
HINDUNILVR	2,230.20	2,194.05	1.65
ONGC	284.20	279.85	1.55
TITAN	3,651.00	3,600.60	1.40
DIVISLAB	3,764.70	3,716.55	1.30

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,415.20	1,468.15	-3.61
LTIM	4,668.50	4,815.15	-3.05
INDUSINDBK	1,494.20	1,539.90	-2.97
BAJAJFINSV	1,618.35	1,656.85	-2.32
WIPRO	449.00	459.35	-2.25

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
INFY	1,61,73,541	1,415.20	2,307.30
ONGC	7,90,82,544	284.20	2,268.09
HDFCBANK	1,03,72,443	1,512.00	1,555.30
RELIANCE	46,83,092	2,936.50	1,368.76
ICICIBANK	1,12,78,092	1,068.75	1,203.97

Most Active (by volume)

Name	Qty	Pr.	Value CR
ONGC	7,90,82,544	284.20	2,268
TATASTEEL	4,13,91,261	160.30	665.57
INFY	1,61,73,541	1,415.20	2,307.3
NTPC	1,53,28,939	359.40	549.73
SBIN	1,33,38,991	752.80	1,000.5



Local equities continued their southward journey on Tuesday and ended in red as traders were cautious with rising geopolitical tensions in the Middle East. Weak exports data also dampened the sentiments on the Street. After making gap down opening, markets remained lower following the broad sell-off on Wall Street overnight as well as lackluster trade in Asian counterparts, as bond yields spiked after a report showed a much stronger than expected U.S. retail sales growth in March. Besides, traders were concerned with report that India's merchandise exports dipped marginally in March to \$41.69 billion, and by 3.11 per cent during the last fiscal year to \$437.06 billion mainly due to continued geopolitical turmoil, and depressed global trade. Imports, too, declined in March as well during the entire 2023-24. Trade deficit narrowed 17.74 per cent in March to \$15.6 billion and came down 9.33 per cent to \$240.17 billion in FY24. Markets touched low points in afternoon session. Traders ignored Reserve Bank of India's (RBI) latest data on 'Overseas Direct Investment' showing that India's outward foreign direct investment (OFDI) commitments rose 48.68% to \$3919.84 million in March 2024 as against \$2636.42 million in March 2023.

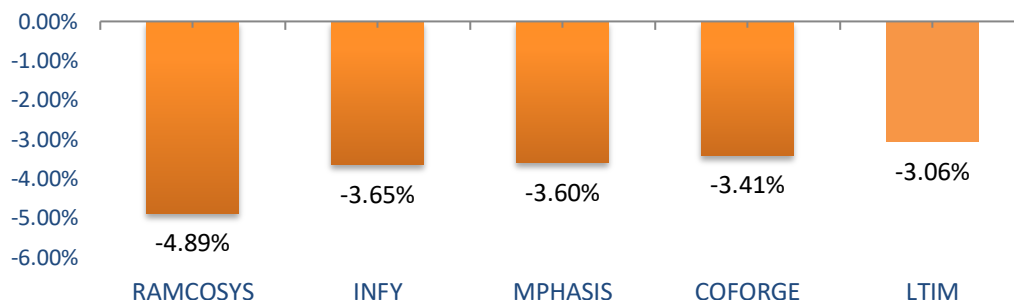
On the global front, European markets were trading lower as investors ponder over a wider Middle East conflict and the outlook for U.S. interest rates.

Source: AceEquity

NEWS BULLETIN

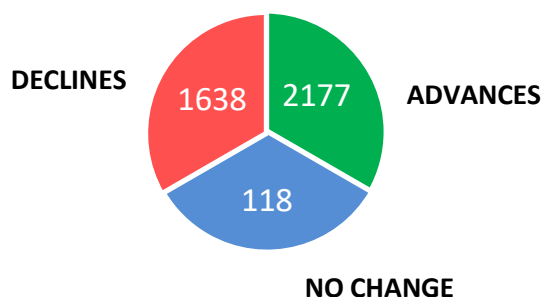
- **Bharti Airtel** has registered significant increase in 5G users across various States. The company has 5.9 million customers enjoying 5G service in the state of Tamil Nadu, 3 million customers in the state of Gujarat and 1.2 million customers in the state of Jammu, Kashmir and Ladakh.
- **Veranda Learning Solutions** has signed strategic agreement with Pearson, the world's leading learning company, to synergize their expertise in content creation and delivery of resources for test preparation and higher education in India.
- **Aditya Birla Capital (ABC)** has launched its omnichannel D2C platform ABCD making 'Everything Finance as Simple as ABCD'. Through this platform, ABC targets to add 30 million new users over the next 3 years.
- **Indian Hotels Company (IHCL)** has signed a Taj-branded resort in Pushkar, Rajasthan. With the addition of this hotel, IHCL will have 28 hotels across Taj, SeleQtions, Vivanta and Ginger brands in Rajasthan including 8 under development.

MARKET DRIVING SECTOR : IT

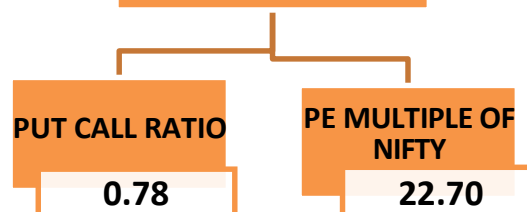


S&P BSE: IT
CLOSING: 34,400.21
CHANGE: -816.89
% CHANGE: -2.32%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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