

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	72,943.68	73,183.10	73,473.05	72,365.67	72,488.99	-454.69	-0.62
NIFTY	22,147.90	22,212.35	22,326.50	21,961.70	21,995.85	-152.05	-0.69

INDICES CLOSE LOWER AMID HIGH VOLATILITY

The 30-share BSE Sensex was down by 454.69 points or 0.62% to settle at 72,488.99 and the Nifty was down by 152.05 points or 0.69% to settle at 21,995.85. The BSE Mid Cap was down by 0.39% and BSE Small Cap was up by 0.06%. On the sectoral front, there was no gaining index; on the flipside, Healthcare, Oil & Gas, FMCG, Auto, Consumer Durables, IT, Metal, Realty, Capital Goods and Bank were losing indices. Bharti Airtel, Powergrid, Infosys and Larsen & Toubro were the top gainers on the Sensex; on the flip side, Nestle, Titan, Axis Bank, NTPC and Tata Motors 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
BHARTIARTL	1,265.50	1,216.45	4.03
POWERGRID	281.30	274.25	2.57
BAJAJ-AUTO	9,063.15	8,919.15	1.61
HINDALCO	616.15	608.85	1.20
INFY	1,429.50	1,414.45	1.06

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
APOLLOHOSP	6,100.00	6,334.75	-3.71
NESTLEIND	2,471.00	2,546.10	-2.95
TITAN	3,538.80	3,645.90	-2.94
ONGC	275.00	283.15	-2.88
AXISBANK	1,025.85	1,051.90	-2.48

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
INFY	2,21,07,945	1,429.50	3,144.28
RELIANCE	95,02,846	2,925.00	2,794.15
HDFCBANK	1,71,17,442	1,496.80	2,574.19
BHARTIARTL	1,99,39,924	1,265.50	2,510.48
AXISBANK	1,78,32,438	1,025.85	1,840.82

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	6,80,93,672	161.20	1,102.7
POWERGRID	5,10,39,603	281.30	1,440.6
ONGC	3,41,36,482	275.00	956.37
NTPC	2,29,66,560	353.40	817.63
INFY	2,21,07,945	1,429.50	3,144.2



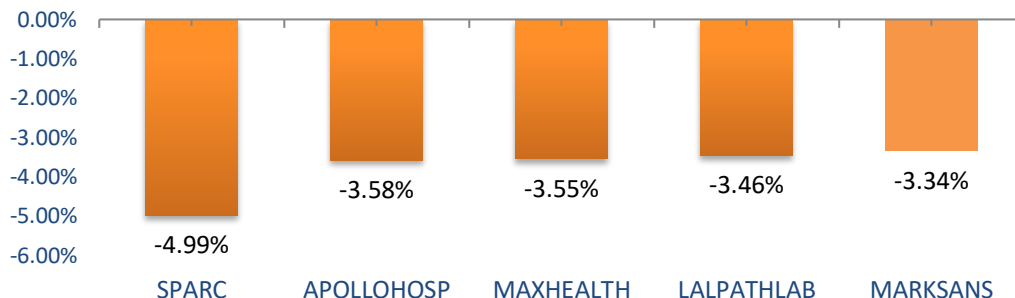
Selling pressure in last leg of trade forced Indian equity markets to end Thursday's trade with cut of around half a percent. Markets ended the session near day's low points amid profit booking by investors. Markets made slightly positive start and maintained their gains as traders took support after International Monetary Fund raised India's FY25 GDP growth forecast by 30 bps to 6.8 percent from its January forecast of 6.5 percent, citing bullish domestic demand conditions and a rising working-age population. With this, India continues to be the fastest growing economy of the world, ahead of China's growth projection of 4.6 percent during the same period. Investors ignored report that former Reserve Bank of India (RBI) Governor Raghuram Rajan expressed concerns regarding India's employment situation, despite the economy displaying signs of growth. He highlighted the necessity of tackling the scarcity of private sector jobs, noting the rising trend of individuals opting for government employment as a significant indicator. However, in late afternoon session, markets erased all their gains and turned negative, as traders opted to book profit.

On the global front, European markets were trading mostly in green as investors kept a close eye on developments in the Middle East and awaited comments later today from Bank of England policymaker Megan Greene for further clues on when the central might lower interest rates. Source: AceEquity

NEWS BULLETIN

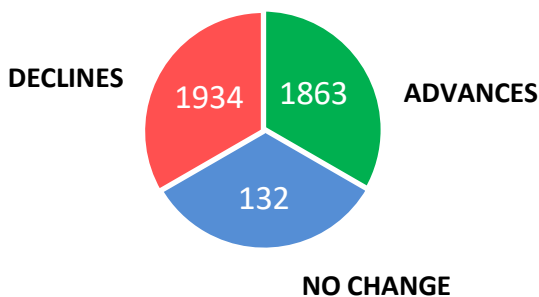
- **Bharti Airtel** has deployed additional sites in Dhar district to densify its network. Dhar district network enhancement project was undertaken across 671 villages covering 13.9 lakh rural population.
- **Ashok Leyland** has partnered with South Indian Bank to provide financing to dealers under the bank's dealer finance programme.
- **LTIMindtree** has collaborated with Vodafone, a global leader in managed Internet of Things (IoT), with over 175 million connections worldwide, supporting a wide range of business-critical applications. Through this partnership, LTIMindtree will offer connected and smart IoT solutions, powered by its Insight NXT platform (iNXT) and Vodafone's IoT Managed Connectivity, that will enable Industry X.0 and digital transformation across multiple vertical sectors.
- **HDFC Life Insurance Company** has reported 14.78% rise in its net profit at Rs 411.66 crore for the quarter under review as compared to Rs 358.66 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : HEALTHCARE

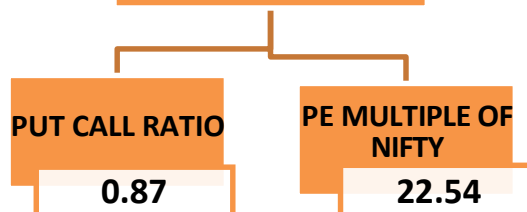


S&P BSE: HEALTHCARE
CLOSING: 34,575.56
CHANGE: -430.75
% CHANGE: -1.23%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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