

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,878.15	74,196.68	74,359.69	73,786.29	73,895.54	+17.39	+0.02
NIFTY	22,475.85	22,561.60	22,588.80	22,409.45	22,442.70	-33.15	-0.15

CHOPPY SESSION END ON A FLAT NOTE

The 30-share BSE Sensex was up by 17.39 points or 0.02% to settle at 73,895.54 and the Nifty was down by 33.15 points or 0.15% to settle at 22,442.70. The BSE Mid Cap was down by 0.95% and BSE Small Cap was down by 1.06%. On the sectoral front, Realty, Auto, IT, Bank, Healthcare, FMCG were gaining indices; on the flipside, Consumer Durables, Oil & Gas, Capital Goods and Metal were losing indices. Powergrid, Asian Paint, Tata Motors, NTPC and Tata Steel were the top gainers on the Sensex; on the flip side, Kotak Bank, Axis Bank, Bharti Airtel, Wipro and ICICI Bank 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
BRITANNIA	5,057.90	4,744.60	6.60
KOTAKBANK	1,624.40	1,546.70	5.02
TCS	3,922.20	3,843.40	2.05
HINDUNILVR	2,257.00	2,217.05	1.80
M&M	2,227.00	2,193.00	1.55

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
TITAN	3,284.00	3,533.90	-7.07
ADANIENT	2,872.00	2,993.25	-4.05
COALINDIA	460.05	474.60	-3.07
BPCL	611.65	629.85	-2.89
SBIN	809.50	831.45	-2.64

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
KOTAKBANK	2,16,08,211	1,624.40	3,494.05
SBIN	3,52,83,557	809.50	2,856.84
TITAN	68,91,728	3,284.00	2,288.07
HDFCBANK	1,43,96,698	1,523.75	2,196.53
ICICIBANK	1,49,70,524	1,149.00	1,719.74

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	3,76,21,296	167.50	628.92
COALINDIA	3,64,08,390	460.05	1,686.5
SBIN	3,52,83,557	809.50	2,856.8
KOTAKBANK	2,16,08,211	1,624.40	3,494.0
POWERGRID	1,68,55,909	308.35	516.73



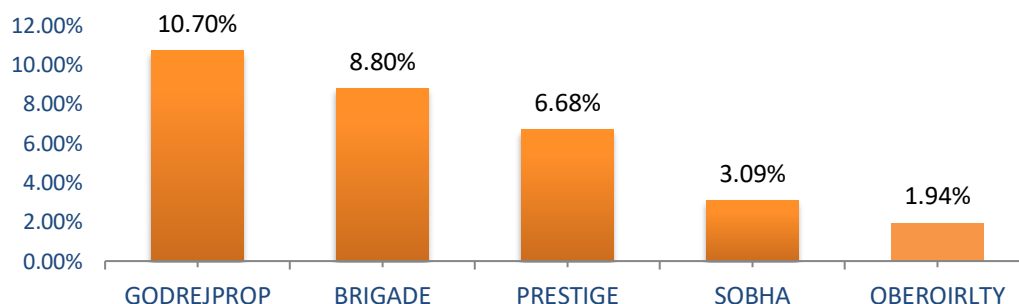
The volatility witnessed over Dalal Street on Monday with Sensex and Nifty ending flat, amid slower India's services sector activity. Key indices made an optimistic start of the trading session, as the data from National Securities Depository (NSDL) showed that foreign portfolio investors (FPIs) have again returned as net buyers in the Indian stock market in May. However, markets turned volatile, after India's services sector activity growth eased during the month of April. According to the survey report, the seasonally adjusted HSBC India Services PMI Business Activity Index fell to 60.8 in April from 61.2 in March. Further, the HSBC India Composite PMI Output Index -- which measures both manufacturing and services -- also eased to 61.5 in April as against 61.8 in March. There was some cautiousness as the Reserve Bank of India (RBI) said India's forex reserves dropped \$2.412 billion to \$637.922 billion as on April 26, in the third consecutive weekly decline in the reserves.

On the global front, European markets were trading higher, as weaker-than-expected April U.S. jobs report released on Friday boosted the case for rate cuts by the third quarter. Asian markets ended in green, after the private sector in Hong Kong continued to expand in April, although at a slower pace, with a services PMI score of 50.6. That's down from 50.9 in March, Source: AceEquity

NEWS BULLETIN

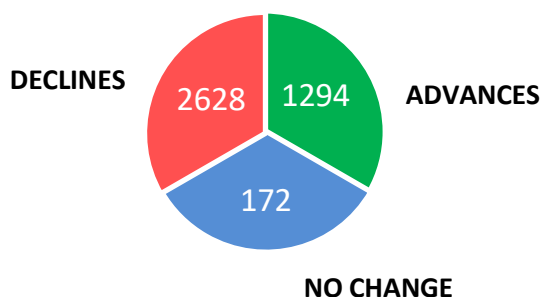
- **Marico** has reported 12.25% rise in its net profit at Rs 229 crore for the quarter under review as compared to Rs 204 crore for the same quarter in the previous year.
- **Indian Bank** has reported 55.26% rise in its net profit at Rs 2,247.00 crore for the quarter under review as compared to Rs 1,447.28 crore for the same quarter in the previous year.
- **HCLTech** has entered into a global strategic collaboration agreement with Amazon Web Services (AWS) to accelerate GenAI-led enterprise digital transformation. HCLTech and AWS will help enterprises explore and develop GenAI-led use cases, proofs of concept, tools and solutions.
- **Birla Corporation** has reported 42.08% fall in its net profit at Rs 59.26 crore for the quarter under review as compared to Rs 41.71 crore for the same quarter in the previous year.
- **IDBI Bank** has reported 43.68% rise in its net profit at Rs 1,628.46 crore for the quarter under review as compared to Rs 1,133.37 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : REALTY

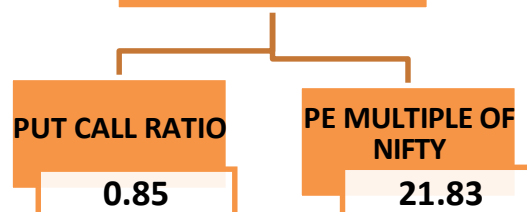


S&P BSE: REALTY
CLOSING: 7,758.85
CHANGE: +204.52
% CHANGE: +2.71%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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