

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,511.85	73,225.00	73,684.93	73,073.92	73,466.39	-45.46	-0.06
NIFTY	22,302.50	22,231.20	22,368.65	22,185.20	22,302.50	00.00	-0.00

## HIGHLY VOLATILE DAY END ON FLAT NOTE

The 30-share BSE Sensex was down by 45.46 points or 0.06% to settle at 73,466.39 and the Nifty close by 0.00 points or 0.00% to settle at 22,302.50. The BSE Mid Cap was up by 0.78% and BSE Small Cap was up by 0.50%. On the sectoral front, Capital Goods, Oil & Gas, Metal, Realty, Auto, FMCG and were gaining indices; on the flipside, IT, Consumer Durables, Bank, Healthcare, and were losing indices. Tata Motors, Powergrid, NTPC, Larsen & Toubro and Maruti were the top gainers on the Sensex; on the flip side, Asian Paint, Ultratech Cement, Hindustan Unilever, HDFC Bank 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 positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
BPCL	621.10	604.30	2.78
HEROMOTO	4,588.00	4,476.75	2.49
TATAMOTORS	1,013.10	988.55	2.48
HINDALCO	633.90	620.20	2.21
COALINDIA	465.55	456.00	2.09

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
DRREDDY	6,053.00	6,257.60	-3.27
ASIANPAINT	2,848.70	2,913.00	-2.21
GRASIM	2,370.90	2,421.00	-2.07
ULTRACEMCO	9,510.00	9,682.40	-1.78
HDFCBANK	1,483.50	1,506.15	-1.50

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,08,43,931	1,483.50	3,098.64
SBIN	2,79,08,322	811.40	2,265.77
ICICIBANK	1,99,13,090	1,126.50	2,234.13
KOTAKBANK	98,53,753	1,648.00	1,622.73
LT	41,16,670	3,482.75	1,408.98

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	3,01,28,705	166.40	499.77
SBIN	2,79,08,322	811.40	2,265.7
HDFCBANK	2,08,43,931	1,483.50	3,098.6
ICICIBANK	1,99,13,090	1,126.50	2,234.1
POWERGRID	1,87,54,452	301.25	559.39



The hawkish Fed comments and the ongoing conflict in the Middle East left impact on Indian equity benchmarks on Wednesday, with both Sensex and Nifty ending trading session on a flat note. The start of the day was in red, amid foreign fund outflows. However, in afternoon deals, markets staged recovery, as Chief Economic Adviser in the Ministry of Rural Development Kuntal Sensarma said that robust capital expenditure by the government and improvement in business confidence will push the country's economic growth in 2024-25. He said that the focus areas in 2024-25 should be infrastructure growth, inclusive development and harnessing demographic dividend, among others. Traders got relief, after Fitch Ratings said that the potential big foreign inflows into Indian bonds will help the rupee recover from near a record low, but the nation's central bank is likely to limit the extent of gains. Investors got some support with government's chief economic adviser V. Anantha Nageswaran's statement that India does not see any nasty upside to inflation at the moment, and expects its economy to expand by more than 7 per cent in the current fiscal year.

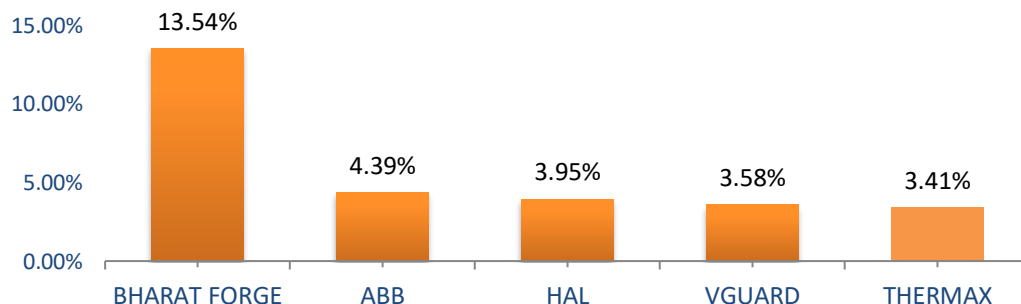
On the global front, European markets were trading higher, even after Germany's industrial production declined for the first time in three months in March driven by the decreases in consumer and intermediate goods output.

Source: AceEquity

## NEWS BULLETIN

- **Bharat Forge** has reported 59.35% rise in its net profit at Rs 389.65 crore for the quarter under review as compared to Rs 244.52 crore for the same quarter in the previous year.
- **Hero MotoCorp** has reported 18.29% rise in its net profit at Rs 1,016.05 crore for the quarter under review as compared to Rs 858.93 crore for the same quarter in the previous year.
- **Westlife Foodworld** has opened a record-breaking 41 stores in FY24, bringing the total store count to 397. This includes 81 Drive-Thru locations, 292 Experience of the Future (EOTF) stores, and 360 McCafes, which together account for 91% of the total restaurant base.
- **Canara Bank** has reported 18.35% rise in its net profit at Rs 3,757.23 crore for the quarter under review as compared to Rs 3,174.74 crore for the same quarter in the previous year.
- **Voltas** has reported 21.53% rise in its net profit at Rs 190.31 crore for the quarter under review as compared to Rs 156.59 crore for the same quarter in the previous year.

## MARKET DRIVING SECTOR : CAPITAL GOODS



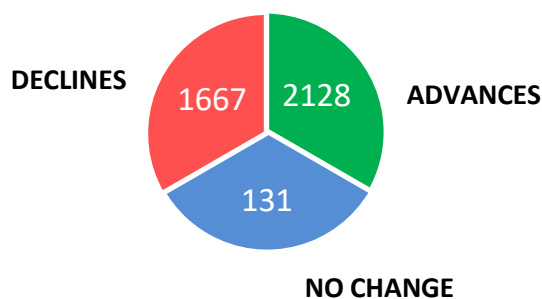
**S&P BSE: CAPITAL GOODS**

**CLOSING: 62.848.24**

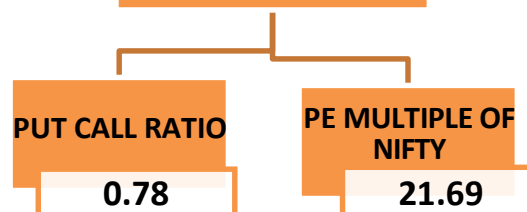
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**% CHANGE: +2.13%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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