

| Index | Previous Close | Open | High | Low | Close | Change | Change% |
|--------|----------------|-----------|-----------|-----------|-----------|---------|---------|
| SENSEX | 75,170.45 | 74,826.94 | 74,986.22 | 74,454.55 | 74,502.90 | -667.55 | -0.89 |
| NIFTY | 22,888.15 | 22,762.75 | 22,825.50 | 22,685.45 | 22,704.70 | -183.45 | -0.80 |

INDICES CONTINUED IT'S DOWNWARD STREAK

The 30-share BSE Sensex was down by 667.55 points or 0.89% to settle at 74,502.90 and the Nifty was down by 183.45 points or 0.80% to settle at 22,704.70. The BSE Mid Cap was down by 0.38% and BSE Small Cap was up by 0.23%. On the sectoral front, Healthcare, Metal, Capital Goods were gaining indices. On the flipside, Realty, Auto, Oil & Gas, Consumer Durables, IT and FMCG were losing indices. Powergrid, Sunpharma, Nestle, ITC and Bharti Airtel were the top gainers on the Sensex; on the flip side, Tech Mahindra, ICICI Bank, Axis Bank, Bajaj Finserv and HDFC Bank 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 |
| HINDALCO | 705.30 | 681.30 | 3.52 |
| DIVISLAB | 4,467.50 | 4,392.10 | 1.72 |
| POWERGRID | 316.85 | 312.80 | 1.29 |
| BAJAJ-AUTO | 9,082.65 | 8,989.75 | 1.03 |
| CIPLA | 1,493.45 | 1,479.45 | 0.95 |

| Top Losers | | | |
|------------|-------------|--------------|-------|
| Name | Closing Pr. | Previous Pr. | %Ch |
| HDFCLIFE | 561.70 | 578.45 | -2.90 |
| SBILIFE | 1,414.00 | 1,450.75 | -2.53 |
| TECHM | 1,285.30 | 1,315.10 | -2.27 |
| TATACONSUM | 1,071.80 | 1,095.55 | -2.17 |
| ICICIBANK | 1,104.00 | 1,126.95 | -2.04 |

MARKET STATS (NSE)

| Most Active (by value) | | | |
|------------------------|-------------|----------|----------|
| Name | Qty | Pr. | Value CR |
| HDFCBANK | 1,75,73,853 | 1,506.00 | 2,654.04 |
| ICICIBANK | 1,92,68,547 | 1,104.00 | 2,129.79 |
| HINDALCO | 2,26,84,652 | 705.30 | 1,588.90 |
| SBIN | 1,45,18,232 | 825.00 | 1,198.18 |
| AXISBANK | 94,18,064 | 1,164.95 | 1,097.36 |

| Most Active (by volume) | | | |
|-------------------------|-------------|----------|----------|
| Name | Qty | Pr. | Value CR |
| TATASTEEL | 3,65,75,550 | 174.00 | 638.32 |
| HINDALCO | 2,26,84,652 | 705.30 | 1,588.9 |
| ICICIBANK | 1,92,68,547 | 1,104.00 | 2,129.7 |
| NTPC | 1,81,46,672 | 365.00 | 660.54 |
| HDFCBANK | 1,75,73,853 | 1,506.00 | 2,654 |



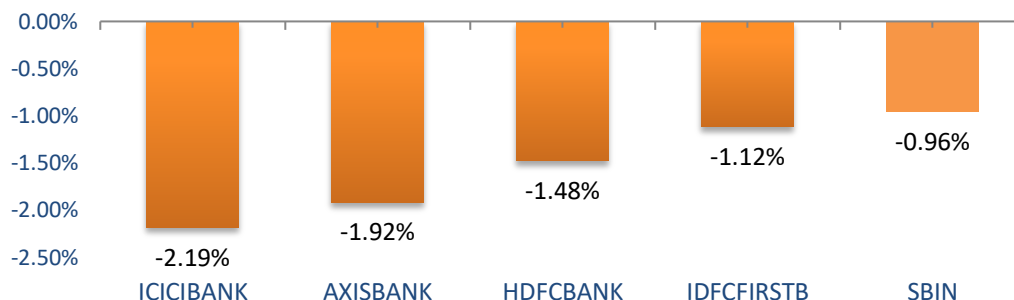
Indian equity markets lost some more ground on Wednesday and concluded the day's trade with cut of over half a percent. Markets witnessed selling pressure till the end of the session ahead of outcome of general elections 2024, which will be declared on June 4. Markets made negative start and extended their losses tracking mixed cues from Wall Street overnight as well as weakness in Asian counterparts as skepticism over the outlook for interest rates continue ahead of the release of key inflation readings from the U.S. and Europe later in the week. The report on US personal income and spending in the month of April, due on Friday, includes readings on inflation said to be preferred by the US Fed. The inflation data could have a significant impact on the outlook for interest rates ahead of the Fed's next monetary policy meeting on June 11-12. Traders were cautious as data released by the government showed the ratio of cost overruns in central government projects rose to a 12-month high of 20.09% in April compared with 18.65% in the previous month.

On the global front, European markets were trading lower as rising bond yields globally spurred concerns of interest rates staying elevated for longer, even as investors awaited more economic data to firm up bets on rate cuts. Asian markets ended mostly in red as the dollar and U.S. bond yields ticked higher following hawkish Fed comments. Source: AceEquity

NEWS BULLETIN

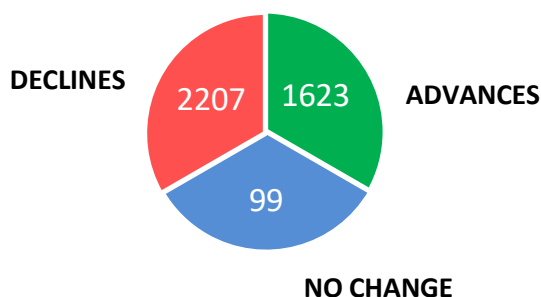
- **Emami** has reported 39.68% rise in its net profit at Rs 151.75 crore for the quarter under review as compared to Rs 108.64 crore for the same quarter in the previous year. Total income of the company increased by 3.71% at Rs 735.75 crore for Q4FY24 as compared Rs 709.40 crore for the corresponding quarter previous year.
- **MTAR Technologies** has reported 83.51% fall in its net profit at Rs 5.07 crore for the quarter under review as compared to Rs 30.74 crore for the same quarter in the previous year. Total income of the company decreased by 28.60% at Rs 143.50 crore for Q4FY24 as compared Rs 200.99 crore for the corresponding quarter previous year.
- **Rudra Global Infra Products** has reported 62.23% rise in its net profit at Rs 6.83 crore for the quarter under review as compared to Rs 4.21 crore for the same quarter in the previous year.
- **Linde India** has reported 5.66% rise in its net profit at Rs 104.33 crore for the quarter under review as compared to Rs 98.74 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : BANK

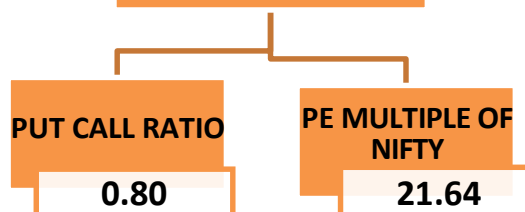


S&P BSE: BANK
CLOSING: 55,310.98
CHANGE: -769.02
% CHANGE: -1.37%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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