

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	72,079.05	73,027.88	74,534.82	71,879.44	74,382.24	+2,303.19	+3.20
NIFTY	21,884.50	22,128.35	22,670.40	21,791.95	22,620.35	+735.85	+3.36

INDICES RECOVERED FROM LOWER LEVELS

The 30-share BSE Sensex was up by 2303.19 points or 3.20% to settle at 74,382.24 and the Nifty was up by 735.85 points or 3.36% to settle at 22,620.35. The BSE Mid Cap was up by 4.41% and BSE Small Cap was up by 2.93%. On the sectoral front, FMCG, Oil & Gas, Metal, Healthcare, Capital Goods, Realty, Auto, Consumer Durables, IT and Bank were gaining indices. On the flipside, there were no losing index. IndusInd Bank, Tata Steel, Mahindra & Mahindra, Bajaj Finance and Kotak Bank were the top gainers on the Sensex; on the flip side, there were no 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
ADANI PORTS	1,340.00	1,248.95	7.29
INDUSINDBK	1,489.75	1,391.50	7.06
HINDALCO	691.00	649.05	6.46
TATASTEEL	169.00	158.95	6.32
M&M	2,728.90	2,572.90	6.06

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
LT	3,399.95	3,403.20	-0.10
BPCL	580.00	580.20	-0.03

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,08,15,825	1,545.85	6,219.60
SBIN	7,42,56,082	787.55	5,726.63
ICICIBANK	4,21,72,104	1,102.95	4,591.83
LT	1,03,72,458	3,399.95	3,426.56
HINDUNILVR	1,10,61,076	2,603.40	2,936.83

Most Active (by volume)			
Name	Qty	Pr.	Value CR
SBIN	7,42,56,082	787.55	5,726.6
TATASTEEL	6,00,98,501	169.00	987.78
NTPC	4,64,18,629	341.80	1,541.3
POWERGRID	4,53,12,613	298.50	1,315.6
ICICIBANK	4,21,72,104	1,102.95	4,591.8



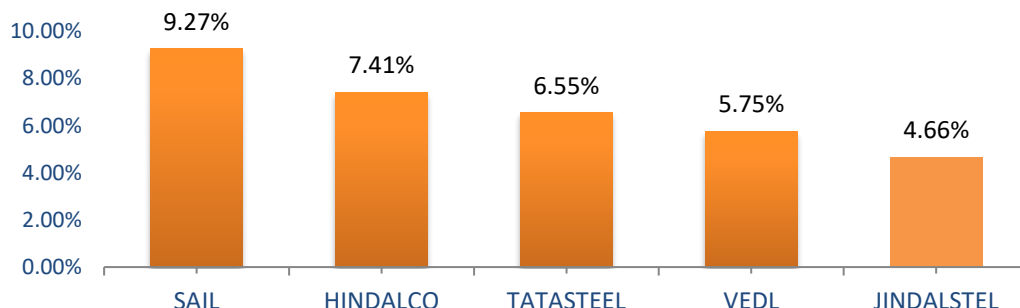
Indian equity markets witnessed recovery in Wednesday's trade and ended with gains of over three percent on hopes of NDA likely to lead the government. Besides, traders were eyeing towards Reserve Bank of India's Monetary Policy Committee (MPC) meeting. Markets made optimistic start and extended their gains as traders preferred to buy stock at lowest levels after yesterday's sell-off and following overnight gains on Wall Street. Sentiments got up-beat with a private report that India's world record beating economic growth rate together with robust tax revenues, a fast expanding digital and financial infrastructure and a strong manufacturing sector will give the new government a base for unleashing next generation reforms that may make the country a developed nation by 2047. In afternoon session, markets continued their gaining momentum even after India's services sector activity growth eased further during the month of May but remained comfortably above the neutral mark of 50.0, highlighting a sharp upturn in output.

On the global front, European markets were trading higher mirroring global sentiment as a soft U.S. labour market data firmed bets of a rate cut from the Federal Reserve, ahead of the European Central Bank's key rate verdict later this week. Asian markets ended mostly in red even as a private survey showed China's services sector in May expanded at its fastest pace since July last year.
Source: AceEquity

NEWS BULLETIN

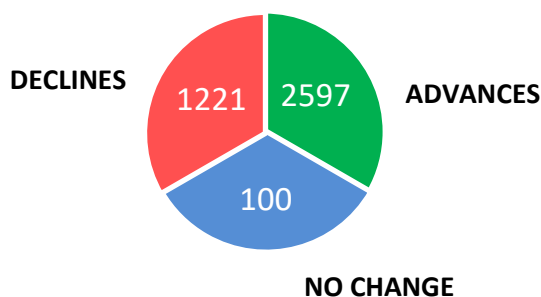
- **Titagarh Rail Systems (TRSL)** has inaugurated new engineering centre in Bangalore, furthering its innovation and design journey.
- **Adroit Infotech's subsidiary -- Verso Altima India** has secured major order worth Rs 2.54 crore from Asianet Satellite Communications for SAP BRIM & CRM Portal Managed Services. This project involves the comprehensive onsite/off shore support for one year.
- **Gopal Snacks** has launched new products Kolapuri Bhadang and Sabudana Chivda under the flagship Brand Name 'Gopal'. These new products are set to add a delightful twist to the traditional snack segment, catering to the diverse taste preferences of Indian consumers.
- **Maruti Suzuki India** is all set to invest Rs 450 crore over a span of three years towards commissioning renewable energy projects linked to solar power and biogas. In FY24, the company invested Rs 120.8 crore in the vertical. The company will increase this investment around four-fold to Rs 450 crore spread over three years starting FY25.

MARKET DRIVING SECTOR : METAL

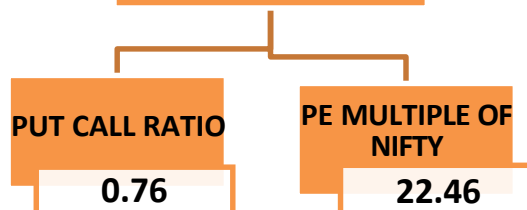


S&P BSE: METAL
CLOSING: 32,120.53
CHANGE: +1,635.33
% CHANGE: +5.36%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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