

10 JUNE 2024



| Index | Previous Close | Open | High | Low | Close | Change | Change% |
|--------|----------------|-----------|-----------|-----------|-----------|---------|---------|
| SENSEX | 76,693.36 | 76,935.41 | 77,079.04 | 76,379.73 | 76,490.08 | -203.28 | -0.27 |
| NIFTY | 23,290.15 | 23,319.15 | 23,411.90 | 23,227.15 | 23,259.20 | -30.95 | -0.13 |

THE MARKET ABANDONS ITS THREE DAY ADVANCES

The 30-share BSE Sensex was down by 203.28 points or 0.27% to settle at 76,490.08 and the Nifty was down by 30.95 points or 0.13% to settle at 23,259.20. The BSE Mid Cap was up by 0.56% and BSE Small Cap was up by 1.04%. On the sectoral front, Realty, FMCG, Healthcare, Capital Goods, Consumer Durables and Bank were gaining indices. On the flipside, IT, Metal, Auto and Oil & Gas were losing indices. Ultratech Cement, Powergrid, Nestle, Axis Bank and NTPC were the top gainers on the Sensex; on the flip side, Tech Mahindra, Infosys, Wipro, Mahindra & Mahindra and Bajaj Finance were the 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 |
| ULTRACEMCO | 10,804.00 | 10,463.15 | 3.26 |
| GRASIM | 2,437.65 | 2,379.85 | 2.43 |
| HEROMOTO | 5,710.00 | 5,581.85 | 2.30 |
| CIPLA | 1,529.00 | 1,497.25 | 2.12 |
| POWERGRID | 315.8 | 309.35 | 2.09 |

| Top Losers | | | |
|------------|-------------|--------------|-------|
| Name | Closing Pr. | Previous Pr. | %Ch |
| TECHM | 1,341.00 | 1,377.60 | -2.66 |
| INFY | 1,498.10 | 1,533.60 | -2.31 |
| WIPRO | 475.45 | 484.55 | -1.88 |
| LTIM | 4,898.00 | 4,977.20 | -1.59 |
| BAJFINANCE | 7,081.55 | 7,191.40 | -1.53 |

MARKET STATS (NSE)

| Most Active (by value) | | | |
|------------------------|-------------|----------|----------|
| Name | Qty | Pr. | Value CR |
| HDFCBANK | 1,12,27,029 | 1,559.55 | 1,759.19 |
| ADANIANT | 49,35,698 | 3,212.30 | 1,603.02 |
| SBIN | 1,67,25,508 | 830.80 | 1,400.23 |
| RELIANCE | 46,25,880 | 2,944.05 | 1,370.01 |
| TATASTEEL | 7,42,86,848 | 180.45 | 1,340.06 |

| Most Active (by volume) | | | |
|-------------------------|-------------|--------|----------|
| Name | Qty | Pr. | Value CR |
| TATASTEEL | 7,42,86,848 | 180.45 | 1,340 |
| POWERGRID | 2,54,78,964 | 315.80 | 813.24 |
| SBIN | 1,67,25,508 | 830.80 | 1,400.2 |
| NTPC | 1,60,72,588 | 364.20 | 589.82 |
| ONGC | 1,41,38,524 | 259.15 | 368.37 |



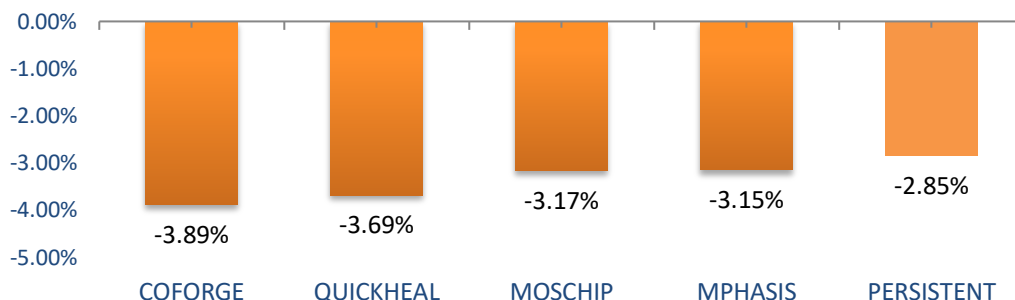
NEWS BULLETIN

- **Shyam Metals and Energy** has reported 82.57% growth in stainless steel sales to 4,949 tonnes in May 2024 as compared to 2,711 tonnes in May 2023.
- **JBM Auto's subsidiary -- JBM Electric Vehicles** has signed an agreement with MUON India, a Macquarie Group company. Macquarie Group has launched an EV financing platform for India called 'Vertelo' which will offer Financing, Fleet Management and Charging Infrastructure Solutions.
- **Jash Engineering** has received the consolidated orders worth Rs 65 crore in the month of May 2024, out of which orders worth Rs 44 crore are for Indian market and orders worth Rs 21 crore are for markets outside India.
- **Ahluwalia Contracts (India)** has secured two orders worth Rs 482.78 crore. The company has secured first order worth Rs 383.98 crore (Including GST) from Birla Arnaa LLP (Joint Venture between Birla Estate and M S Ramaiah Reality (LLP) for Civil Structural and architectural work for project work Birla Trimaya Phase 1, 2 at Devanahalli, Bengaluru.

Indian equity markets wavered between gains and losses during the day and ended in red on Monday. Indices able to hit new high levels during the day. Investors were cautious ahead of consumer price index (CPI) and Index of Industrial Production (IIP) data, which going to be out on June 12. After making positive start, markets turned volatile following the broadly negative cues from Wall Street Friday overnight, as traders react to data showing much stronger than expected US job growth in the month of May and also an unexpected uptick in the unemployment rate. Some cautiousness came in after Fitch Ratings reportedly said as India's medium-term fiscal consolidation, critical to any ratings upgrade, is likely to get more challenging as a new coalition government comes to power. Further, markets traded near neutral line with positive bias. Some comfort came with a labour ministry's statement that retail inflation for industrial workers eased to 3.87 per cent in April compared to 4.2 per cent in March this year.

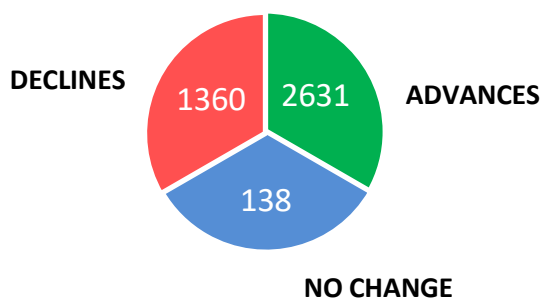
On the global front, European markets were trading lower as a snap election call in France sparked wider political concerns and weighed on the euro. Asian markets ended mixed after a jobs report released Friday came in hotter than expected, while the euro fell after French President Emmanuel Macron dissolved the National Assembly following a setback in Sunday's parliamentary election.
Source: AceEquity

MARKET DRIVING SECTOR : IT

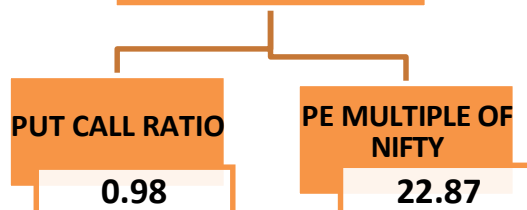


S&P BSE: IT
CLOSING: 35,371.78
CHANGE: -537.63
% CHANGE: -1.50%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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