

21 June 2024



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,478.93	77,729.48	77,808.45	76,802.00	77,209.90	-269.03	-0.35
NIFTY	23,567.00	23,661.51	23,667.10	23,398.20	23,501.10	-65.90	-0.28

## HIGHLY VOLATILE DAY END WITH MINOR LOSS

The 30-share BSE Sensex was down by 269.03 points or 0.35% to settle at 77,209.90 and the Nifty was down by 65.90 points or 0.28% to settle at 23,501.10. The BSE Mid-Cap was down by 0.26% and BSE Small Cap was up by 0.06%. On the sectoral front, IT, Metal and Consumer Durables were the top gaining indices; on the flip side, Oil & Gas, FMCG, Bank, Capital Goods, Realty, Auto and Healthcare were losing indices. Bharti Airtel, Infosys, TCS, JSW Steel and NTPC were the top gainers on the Sensex; on the flip side, Ultratech Cement, Larsen & Toubro, Tata Motors, Nestle and Hindustan Unilever were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are also trading on a negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
BHARTIARTL	1,403.75	1,381.15	1.64
LTIM	5,122.00	5,052.45	1.38
HINDALCO	684.00	676.50	1.11
SHRIRAMFIN	2,827.55	2,805.20	0.80
TATASTEEL	179.94	182.28	0.71

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ULTRACEMCO	10,638.80	10,903.20	-2.42
ADANIANT	3,192.80	3,259.45	-2.04
LT	3,524.00	3,594.45	-1.96
NESTLEIND	2,491.40	2,539.75	-1.90
TATAMOTORS	960.00	978.25	-1.87

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
ICICIBANK	6,92,59,425	1,157.50	8,023.22
BHARTIARTL	4,39,29,578	1,403.75	6,208.74
RELIANCE	1,55,85,180	2,912.00	4,533.93
HDFCBANK	2,58,15,388	1,661.65	4,281.92
ADANIAPORTS	2,58,91,893	1,475.95	3,845.28

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ICICIBANK	6,92,59,425	1,157.50	8,023.2
TATASTEEL	6,54,94,855	179.94	1,177.3
WIPRO	4,75,85,588	491.60	2,340.6
BHARTIARTL	4,39,29,578	1,403.75	6,208.7
BPCL	3,00,04,484	308.30	931.07



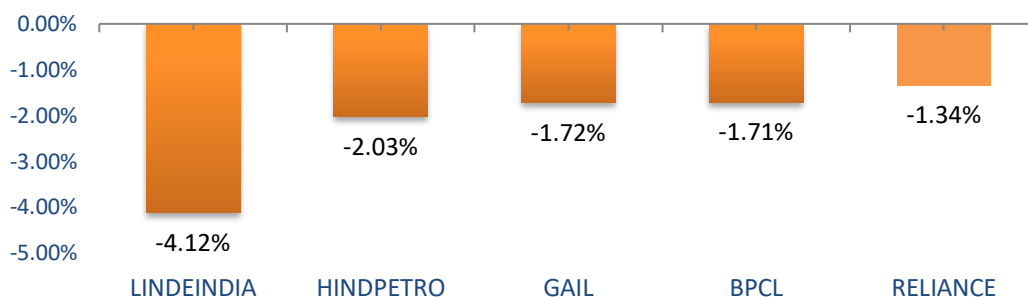
Friday turned out to be a disappointing session of trade for Indian equity benchmarks where frontline gauges failed to hold initial gains and ended with minor losses with Sensex and Nifty managing to hold their crucial 77,200 and 23,500 levels respectively. Indian equity benchmarks soon after a positive opening entered into red terrain as traders turned their attention on the upcoming GST meeting, where the potential rationalization of GST rates in certain sectors is under discussion. Market participants continued to sell risky assets amid concerns over the slow progress of the monsoon, resulting in underperformance in the FMCG sector. However, heatwave in Northern India is driving consumer durables stocks higher during the trade. Some cautiousness crept in as a report by the United Nations Conference on Trade and Development (UNCTAD) said Foreign Direct Investment (FDI) flows to India plummeted by 43 per cent in 2023 to \$28 billion amid a global decline of 2 per cent.

On the global front, Asian markets ended mostly in red as new data showed weakness in the U.S. economy and Treasury yields ticked higher on hawkish comments from Federal Reserve officials. Meanwhile, European markets were trading in red as investors reacted to weak business activity data from the region.  
Source: AceEquity

### NEWS BULLETIN

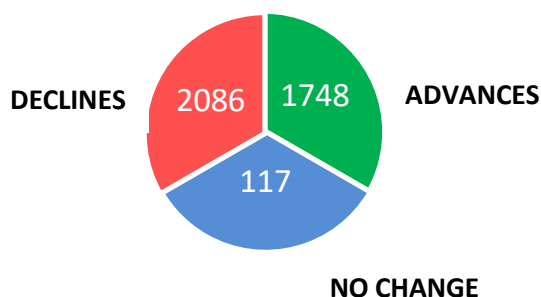
- **Vama Industries** has received a supply order worth of Rs 74.32 crore from NewSpace India (NSIL) (A CPSE under Department of Space, Government of India).
- **Blue Cloud Softech Solutions (BCS)** has bagged strategic 'Digital Transformation' project from Rachana Grammar High School, a reputed 25-year-old educational institution.
- **IndiGo** has partnered with Garuda Aviation Academy to train fresh pilots as future junior first officers, under the airline's Cadet Pilot Program. The 21-month course includes a three-month ground schooling at Garuda Aviation Academy training centre in Gurugram, followed by 12 months of training at 43 Air School in South Africa, which has a track record of training over 6,000 ab-initio pilots over the years.
- **HCL Technologies** has opened new offices in East Brunswick, New Jersey and Santa Clara, California, further strengthening its footprint in North America.

### MARKET DRIVING SECTOR : OIL & GAS

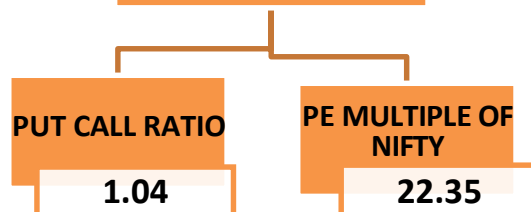


**S&P BSE: OIL & GAS**  
**CLOSING: 28,863.30**  
**CHANGE: -375.29**  
**CHANGE: -1.28%**

### MARKET BREADTH – NEGATIVE



### RATIO ANALYSIS



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