

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,341.08	77,529.19	78,164.71	77,459.60	78,053.52	+712.44	+0.92
NIFTY	23,537.85	23,577.10	23,754.15	23,562.05	23,721.30	+183.45	+0.78

## INDICES HIT NEW RECORD HIGH

The 30-share BSE Sensex was up by 712.44 points or 0.92% to settle at 78,053.52 and the Nifty was up by 183.45 points or 0.78% to settle at 23,721.30. The BSE Mid-Cap was down by 0.26% and BSE Small Cap was down by 0.03%. On the sectoral front, Bank, Capital Goods, IT, and Healthcare were the top gaining indices; on the flip side, FMCG, Realty, Auto, Consumer Durables, Metal and Oil & Gas were losing indices. Axis Bank, ICICI Bank, HDFC Bank, Tech Mahindra and Larsen and Toubro were the top gainers on the Sensex; on the flip side, Powergrid, Tata Steel, Asian Paint, Nestle and Maruti were the top losers on the Sensex. On global front, Asian markets shut the day on a positive note and European indices are trading on a red note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
SHRIRAMFIN	2,996.00	2,882.25	3.95
AXISBANK	1,272.65	1,228.10	3.63
ICICIBANK	1,204.00	1,170.10	2.90
HDFCBANK	1,707.00	1,672.40	2.07
TECHM	1,426.50	1,401.70	1.77

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
BPCL	296.75	305.25	-2.78
EICHERMOT	4,785.00	4,870.90	-1.76
POWERGRID	327.25	332.95	-1.71
ASIANPAINT	2,861.00	2,896.05	-1.21
TATASTEEL	175.86	177.96	-1.18

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	3,72,60,774	1,707.00	6,353.11
ICICIBANK	2,73,09,845	1,204.00	3,247.47
AXISBANK	1,76,07,952	1,272.65	2,217.93
SBIN	2,09,17,530	841.95	1,759.77
BAJFINANCE	15,60,811	7,082.05	1,102.29

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	3,72,60,774	1,707.00	6,353.1
TATASTEEL	3,05,99,989	175.86	540.40
ICICIBANK	2,73,09,845	1,204.00	3,247.4
SBIN	2,09,17,530	841.95	1,759.7
AXISBANK	1,76,07,952	1,272.65	2,217.9



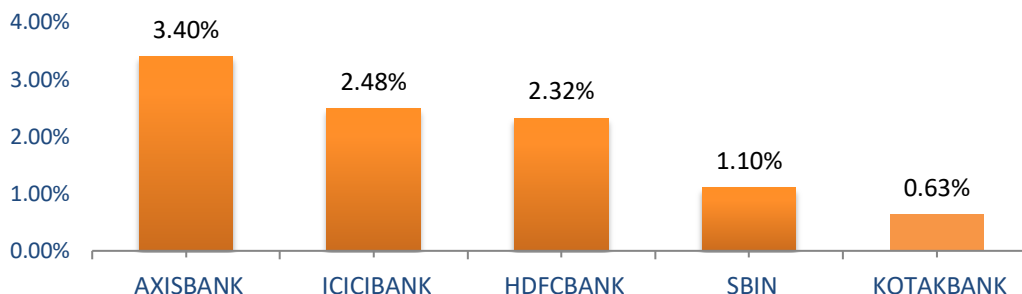
Indian markets showcased courageous performance on Tuesday with Nifty and Sensex settling above the psychological 23,700 and 78,000 levels respectively. Indices marched to newer heights during the day. In first half of the session, markets traded with limited gains. However, in afternoon session markets gave optimistic performance. Markets made positive start and remained in green, as traders took support after The Reserve Bank of India (RBI) said India recorded a current account surplus of \$5.7 billion or 0.6 per cent of GDP in the March quarter. In the year-ago period, the current account deficit stood at \$1.3 billion or 0.2 per cent of GDP. It added for FY24, the current account deficit narrowed to \$23.2 billion or 0.7 per cent of GDP against \$67 billion or 2 per cent of GDP in FY23. Traders took a note of RBI MPC member Jayanth R Varma's statement that with retail inflation nearing the RBI's target of 4 per cent, the monetary policy needs to shift focus on promoting growth.

On the global front, European markets were trading lower after a 7% drop in chipmaker Nvidia dragged down U.S. tech companies on Monday, in a sign of nervousness about the artificial intelligence boom. Asian markets ended mostly in green after China's Premier Li Qiang said the country is capable of achieving the full year growth target of around 5 percent.  
Source: AceEquity

## NEWS BULLETIN

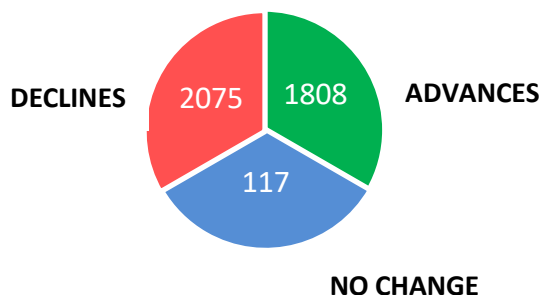
- **Shree Cement** has achieved an installed power capacity of 1,000 MW (1 GW). This milestone follows the commissioning of a 19.5 MW solar power plant at its Andhra Pradesh facility. The one gigawatt capacity comprises diverse energy sources, including solar, wind, thermal, and waste heat recovery.
- **Coal India's subsidiary -- Eastern Coalfields** has commenced its first pilot project for underground coal gasification (UCG) in Jharkhand. This innovative project aims to convert in-situ coal into valuable gases for various industrial uses, signifying a major step in the country's coal mining diversification efforts.
- **India's total cotton production** during 2023-24 cotton season (October-September) is estimated at 325.22 lakh bales of 170 kg each, lower 3.38% as compared to production of 336.60 lakh bales of 170 kg each in 2022-23 season.

## MARKET DRIVING SECTOR : BANK

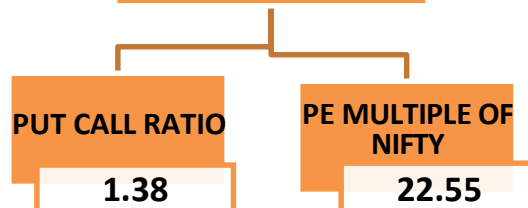


**S&P BSE: BANK**  
**CLOSING: 59,805.21**  
**CHANGE: +1,095.19**  
**CHANGE: +1.87%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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