

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	79,032.73	79,043.35	79,561.00	78,971.79	79,476.19	+443.46	+0.56
NIFTY	24,010.60	23,992.95	24,164.00	23,992.70	24,141.95	+131.35	+0.55

INDICES BEGAN THE MONTH OF JULY WITH A POSITIVE NOTE

The 30-share BSE Sensex was up by 443.46 points or 0.56% to settle at 79,476.19 and the Nifty was up by 131.35 points or 0.55% to settle at 24,141.95. The BSE Mid-Cap was up by 1.11% and BSE Small Cap was up by 1.58%. On the sectoral front, IT, Bank, Capital Goods, Consumer Durables, Healthcare, Metal, Auto, FMCG and Oil & Gas were the top gaining indices; on the flip side, Realty was losing index. Tech Mahindra, Bajaj Finance, Ultratech Cement, TCS and Infosys were the top gainers on the Sensex; on the flip side, NTPC, SBIN, Larsen & Toubro, IndusInd Bank and Bajaj Finserv were the top losers on the Sensex. On global front, Asian markets shut the day on a positive note and European indices are trading

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
TECHM	1,473.00	1,430.35	2.98
WIPRO	527.20	514.85	2.40
BAJFINANCE	7,262.20	7,115.55	2.06
GRASIM	2,725.05	2,670.45	2.04
ULTRACEMCO	11,900.00	11,667.90	1.99

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
NTPC	370.55	378.35	-2.06
EICHERMOT	4,630.00	4,672.95	-0.92
APOLLOHOSP	6,134.75	6,185.70	-0.82
SBIN	842.80	848.95	-0.72
DRREDDY	6,360.00	6,402.35	-0.66

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,05,93,512	1,704.20	1,800.61
TATAMOTOR	1,40,06,105	1,000.00	1,395.62
MARUTI	11,34,926	12,100.0	1,376.05
RELIANCE	38,62,153	3,123.00	1,207.51
INFY	68,01,771	1,586.00	1,080.52

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	2,78,07,688	174.25	485.58
NTPC	2,33,89,211	370.55	866.97
WIPRO	1,53,78,764	527.20	813.29
TATAMOTOR	1,40,06,105	1,000.00	1,395.6
ITC	1,28,94,747	428.50	551.39



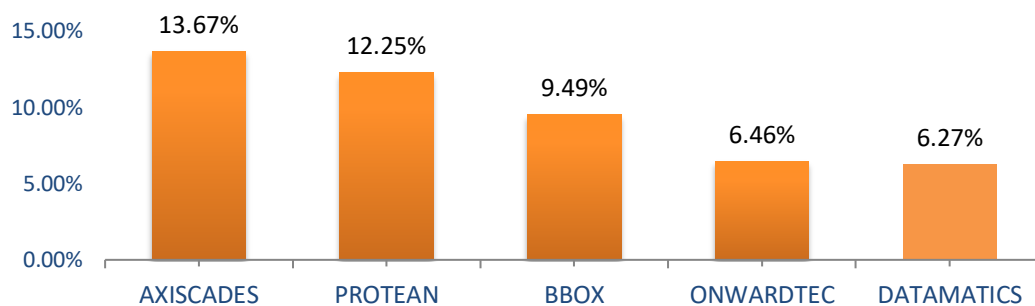
Despite some initial dizziness, Indian equity markets got upto the gains and held it till end to settle at record closing high levels amid positive India’s manufacturing sector data. Traders were eyeing HSBC Composite PMI Final and HSBC Services PMI Final data scheduled to be released on July 03. Markets started first day of new month with cautiousness amid mixed global cues. Besides, government data showed growth of the eight core sectors in India slowed to 6.3 per cent on an annual basis in May, mildly down from 6.7 per cent registered in April. But, markets managed to gain traction and maintained their gains. Traders took encouragement as the data released by the Controller General of Accounts (CGA) showed that a fiscal surplus of Rs 1.6 trillion in May due to the Reserve Bank of India’s (RBI’s) record dividend transfer narrowed the Centre’s fiscal deficit for the first two months of 2024-25 to Rs 0.5 trillion or 3 per cent of the full-year estimate. Meanwhile, Commerce and Industry Minister Piyush Goyal said healthy increase in the country’s exports, improvement in the current account deficit (CAD) and focus on expanding manufacturing will help the Indian economy register a healthy growth rate.

On the global front, European markets were trading higher as the first round of voting left Le Pen’s National Rally looking short of securing a majority in parliament. Source: AceEquity

NEWS BULLETIN

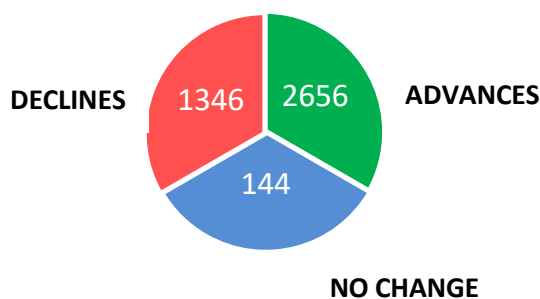
- **Maruti Suzuki India** has reported a 12 per cent increase in total wholesales to 1,79,228 units in June 2024. The company had dispatched 1,59,418 units to its dealers in the same month last year.
- **SML Isuzu** has sold 1764 vehicles in June 2024 as against 1279 vehicles in June 2023, showing a growth of 37.9% year-on-year (Y-o-Y). Segment-wise, in June 2024, the company’s passenger vehicles sales stood at 1425 units, up 40.3% Y-o-Y. Cargo vehicles sales were at 339 units, up 28.9% Y-o-Y.
- **Coal India** has reported 8.9% rise in coal production to 63.1 million tonnes (MT) during June 2024 as compared to 58.0 MT in June 2023.
- **Atul Auto** has sold 2,628 units in the month of June 2024, over 2-fold jump as compared to 1,267 units sold in June 2023. The company has sold 6,651 units in first three months (April-June) of FY25 as against 3,083 units sold in first three months of FY24, showing a rise of 115.73%.

MARKET DRIVING SECTOR : IT

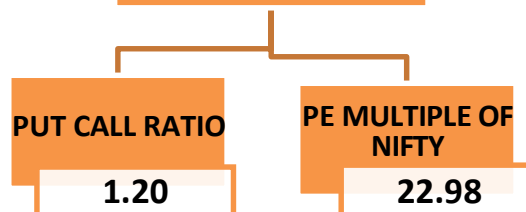


S&P BSE: IT
CLOSING: 37,629.97
CHANGE: +678.61
CHANGE: +1.84%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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