

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	79,996.60	79,915.00	80,067.46	79,731.83	79,960.38	-36.22	-0.05
NIFTY	24,323.85	24,329.45	24,344.60	24,240.55	24,320.55	-03.30	-0.01

INDICES CLOSED THE SESSION ON A FLAT NOTE

The 30-share BSE Sensex was down by 36.22 points or 0.05% to settle at 79,960.38 and the Nifty was down by 3.30 points or 0.01% to settle at 24,320.55. The BSE Mid-Cap was down by 0.14% and BSE Small Cap was down by 0.22%. On the sectoral front, FMCG, Capital Goods, Oil & Gas and IT were the top gaining indices; on the flip side, Consumer Durables, Healthcare, Metal, Bank, Realty, and Auto were losing indices. ITC, Hindustan Unilever, Nestle, HCL Tech and Tata Motors were the top gainers on the Sensex; on the flip side, Titan, Adani Ports, Tata Steel, Asian Paint and JSW Steel were the top losers on the Sensex. On global front, Asian markets shut the day on a negative note and European indices are trading on a green note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
ONGC	300.15	288.20	4.15
ITC	443.80	433.65	2.34
HDFCLIFE	621.00	607.35	2.25
HINDUNILVR	2,581.00	2,547.00	1.33
WIPRO	542.20	535.10	1.33

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
TITAN	3,160.45	3,269.35	-3.33
DIVISLAB	4,480.00	4,629.70	-3.23
BPCL	299.00	306.65	-2.49
SHRIRAMFIN	2,810.00	2,865.85	-1.95
ADANIPTS	1,477.00	1,500.45	-1.56

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,95,43,900	1,636.35	3,205.32
TITAN	53,23,920	3,160.45	1,675.49
ONGC	5,31,36,198	300.15	1,572.88
RELIANCE	47,50,403	3,201.50	1,518.14
TATAMOTOR	1,33,12,085	1,002.90	1,339.01

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ONGC	5,31,36,198	300.15	1,572.8
TATASTEEL	3,14,79,861	172.49	545.70
ITC	2,05,21,107	443.80	902.44
HDFCBANK	1,95,43,900	1,636.35	3,205.3
TATAMOTOR	1,33,12,085	1,002.90	1,339.0



A volatility witnessed over the Dalal Street on Monday's trading session, with both Sensex and Nifty ending lower. After a cautious start, markets remained weak throughout the day, as sentiments were pessimistic, amid a private report stating that India will struggle to create enough jobs for its growing workforce over the next decade even if the economy grows at a rapid pace of 7%. However, indices managed to stage recovery towards end of the day to end flat. The recovery from day's low was supported by gains garnered by ITC, Hindustan Unilever, Nestle India and HCL Tech. Some support came with a report that foreign investors infused over Rs 7,900 crore in Indian equities in the first week of the month amid a healthy economic and earnings growth momentum. With this, total FPI investment in equities reached Rs 1.16 trillion so far this year, data with the depositories showed.

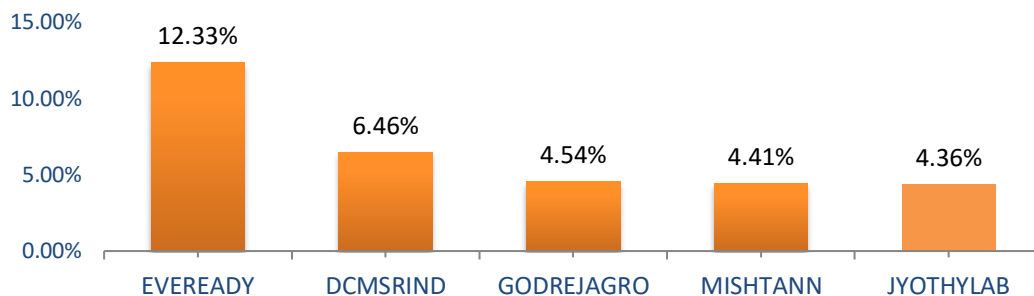
On the global front, European markets were trading higher, as traders digested the unexpected result of France's snap election and looked forward to upcoming Congressional testimony by Fed Chair Jerome Powell as well as the release of U.S. CPI data this week for greater clarity on Fed's monetary policy path.

Source: AceEquity

NEWS BULLETIN

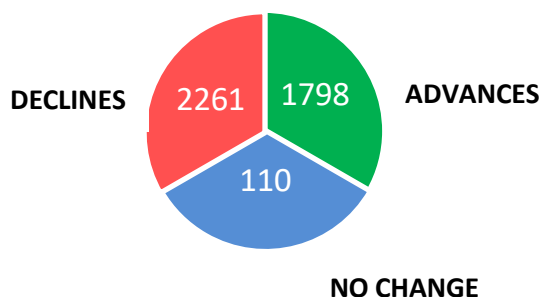
- **Tata Motors** Group's global wholesales in Q1 FY25, including Jaguar Land Rover were at 3,29,847 units, higher by 2%, as compared to Q1FY24. Global wholesales of all Tata Motors' commercial vehicles and Tata Daewoo range in Q1 FY25 were at 93,410 units, higher by 6%, over Q1 FY24.
- **Marine Electricals (India)** has received an order amounting to around Rs 50.00 crore (Excluding Taxes) from DC Development Hyderabad, for Supply of FIM LV Panels and Skid for HYD20 expansion (DC 2 & 3) 28.8 MW. The Delivery shall be over a period of 20 months.
- **Federal Bank** has launched new Life Insurance products. This product caters to domestic market. The bank has launched new product on July 5, 2024. Furthermore, the bank has entered into a strategic Bancassurance partnership with Bajaj Allianz Life Insurance. With this collaboration, it now has a total of 10 insurance partners.

MARKET DRIVING SECTOR : FMCG

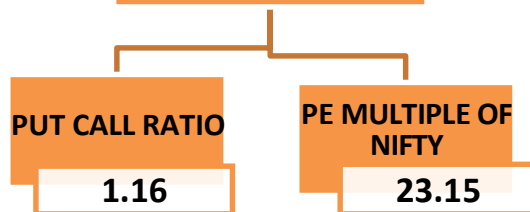


S&P BSE: FMCG
CLOSING: 21,232.70
CHANGE: + 305.92
CHANGE: + 1.46

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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