

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	81,741.34	81,949.68	82,129.49	81,700.21	81,867.55	+126.21	+0.15
NIFTY	24,951.15	25,030.95	25,078.30	24,956.40	25,010.90	+59.75	+0.24

INDICES HIT FRESH HIGH, CLOSED ABOVE 25K

The 30-share BSE Sensex was up by 126.21 points or 0.15% to settle at 81,867.55 and the Nifty was up by 59.75 points or 0.24% to settle at 25,010.90. The BSE Mid-Cap was down by 0.80% and BSE Small Cap was down by 0.70%. On the sectoral front, Metal, Healthcare, Oil & Gas, FMCG and were the top gaining indices; on the flip side, Capital Goods, Consumer Durables, IT, Auto, Bank and Realty were the losing indices. Powergrid, NTPC, HDFC Bank, Nestle and Adani Ports were the top gainers on the Sensex; Mahindra & Mahindra, Tata Steel, Bajaj Finserv, SBIN and Tata Motors on the flip side, 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 red note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
POWERGRID	361.50	348.20	3.82
COALINDIA	540.30	522.20	3.47
ONGC	341.00	334.20	2.03
HDFCBANK	1,647.65	1,615.75	1.97
DRREDDY	6,882.85	6,750.50	1.96

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
M&M	2,827.00	2,907.80	-2.78
TATASTEEL	163.07	165.33	-1.37
HEROMOTO	5,375.00	5,488.45	-1.35
BRITANNIA	5,708.05	5,784.45	-1.32
TATAMOTORS	1,142.65	1,156.65	-1.21

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
MARUTI	20,40,384	13,343	2,732.95
HDFCBANK	1,31,07,587	1,647.65	2,139.93
ADANIEN	61,49,883	3,225.10	1,975.62
TATASTEEL	11,83,41,338	163.07	1,941.15
COALINDIA	3,47,63,894	540.30	1,866.06

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	11,83,41,338	163.07	1,941.1
ONGC	3,60,44,960	341.00	1,229.2
COALINDIA	3,47,63,894	540.30	1,866
NTPC	2,88,03,487	423.50	1,214.6
POWERGRID	2,67,92,459	361.50	962.92



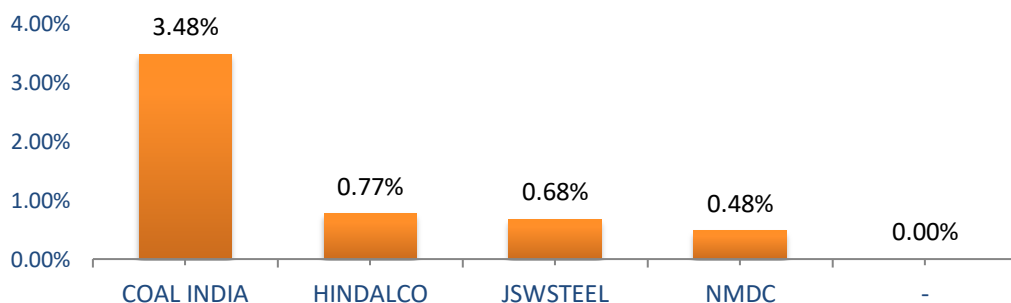
In volatile session, Indian equity benchmarks managed to scale their fresh closing highs on Thursday, as investors cheered Fed Chair Jerome Powell's dovish remarks on interest-rate cuts. After a strong start, markets held their gaining momentum in morning deals, as traders took encouragement after Commerce and Industry Minister Piyush Goyal expressed hope that steps such as focus on self-sufficiency, technology, stronger currency and fundamentals would help India become a \$55-trillion economy by 2047. However, in noon deals, a sharp correction witnessed over the Dalal Street, as sentiments got hit, after India's manufacturing sector growth eased in the month of July, amid slightly softer increases in new orders and output. According to the survey report, the seasonally adjusted HSBC India Manufacturing Purchasing Managers' Index (PMI) eased to 58.1 in July 2024 as against 58.3 in June 2024.

On the global front, European markets were trading lower, as the euro area manufacturing sector continued to contract on steep reduction in orders and output in July. The final data from S&P Global showed that the HCOB manufacturing Purchasing Managers' Index posted 45.8 in July, unchanged from June and above the flash estimate of 45.6. Source: AceEquity

NEWS BULLETIN

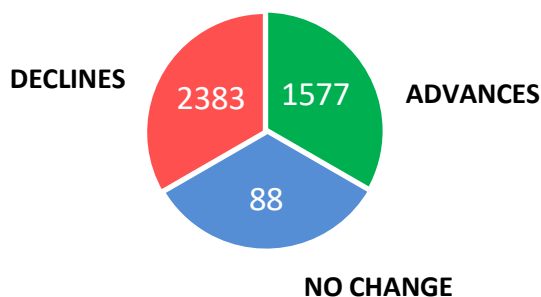
- **VST Tillers Tractors** was incorporated in technical collaboration and joint venture with Mitsubishi Heavy Industries and Mitsubishi Corporation, Japan for the manufacture of Power Tillers and Diesel Engines.
- **Tata Steel** has reported 36.15% fall in net profit at Rs 3,329.03 crore for first quarter ended June 30, 2024 (Q1FY25) as compared to Rs 5,214.17 crore for the same quarter in the previous year.
- **Hero MotoCorp** has commenced operations in the Philippines. This strategic expansion marks a significant milestone in the company's efforts to strengthen its global presence.
- **Adani Power** has reported 69.82% fall in net profit at Rs 2,454.88 crore for Q1FY25 as compared to Rs 8,133.06 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR :METAL

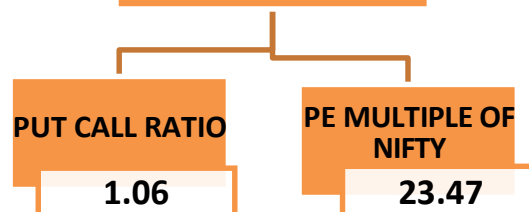


S&P BSE: METAL
CLOSING: 32,885.41
CHANGE: + 114.35
CHANGE: +0.35%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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