

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	79,648.92	79,552.51	79,692.55	78,889.38	78,956.03	-692.89	-0.87
NIFTY	24,347.00	24,342.35	24,359.95	24,116.50	24,139.00	-208.00	-0.85

## BOURSES CLOSED WITH SUBSTANTIAL LOSSES

The 30-share BSE Sensex was down by 692.89 points or 0.87% to settle at 78,956.03 and the Nifty was down by 208 points or 0.85% to settle at 24,139.00. The BSE Mid-Cap was down by 0.98% and BSE Small Cap was down by 1.16%. On the sectoral front, Consumer Durables were the top gaining index; on the flip side, Metal, Realty, Healthcare, FMCG, Oil & Gas, IT, Capital Goods, Bank and Auto were losing indices. Titan, HCL Tech, Nestle, Sunpharma and Reliance were the top gainers on the Sensex; on the flip side, HDFC Bank, Bajaj Finance, Tata Motors, Tata Steel and SBIN 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
TITAN	3,385.00	3,320.85	1.93
APOLLOHOSP	6,600.00	6,502.40	1.50
TATACONSUM	1,180.85	1,170.80	0.86
DRREDDY	6,940.05	6,886.55	0.78
HCLTECH	1,594.00	1,585.25	0.55

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
BPCL	321.60	333.40	-3.54
HDFCBANK	1,605.90	1,660.10	-3.26
HDFCLIFE	682.95	702.45	-2.78
SHRIRAMFIN	2,900.95	2,976.10	-2.53
ONGC	334.00	341.30	-2.14

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,70,27,521	1,605.90	4,360.40
ICICIBANK	1,31,17,927	1,170.45	1,538.04
SBIN	1,75,85,172	797.00	1,419.14
ONGC	2,89,43,385	334.00	981.44
RELIANCE	31,32,532	2,925.00	917.30

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	2,93,96,493	148.90	442.18
ONGC	2,89,43,385	334.00	981.44
HDFCBANK	2,70,27,521	1,605.90	4,360.4
SBIN	1,75,85,172	797.00	1,419.1
ICICIBANK	1,31,17,927	1,170.45	1,538.0



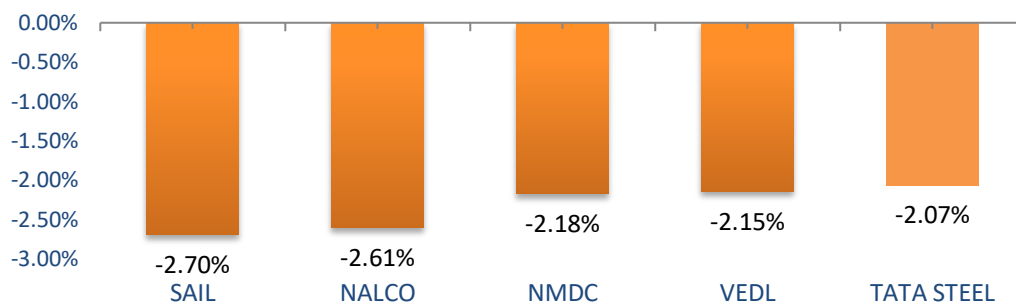
The domestic equity indices ended with substantial losses on Tuesday as the banking sector dragged the market to settle near day's low. Sensex, Nifty declined for the second day in a row. The Nifty closed below the 24,150 mark after hitting the day's high of 24,359.95 in early trade. India's CPI inflation in July 2024 stood at 3.54%, which is the lowest since August 2019, according to official data released on Monday, August 12. In the previous month of June 2024, India's retail inflation had stood at 5.08%. Meanwhile, India's IIP recorded a growth of 4.2% in June 2024. The factory output, measured in terms of the IIP witnessed a growth of 4% in June 2023. Asian markets settled higher on Tuesday as investors were awaiting US producer and consumer price inflation data due this week for additional cues on the Federal Reserve's interest rate trajectory. Chinese and Hong Kong markets were gained ahead of quarterly and half-year earnings.

European market declined while Asian stocks ended higher on Tuesday, buoyed by strong performance in Japan amid a steady yen. Investors are keenly watching for the release of U.S. inflation data, which will offer clues about the Federal Reserve's next interest rate move. Source: AceEquity

### NEWS BULLETIN

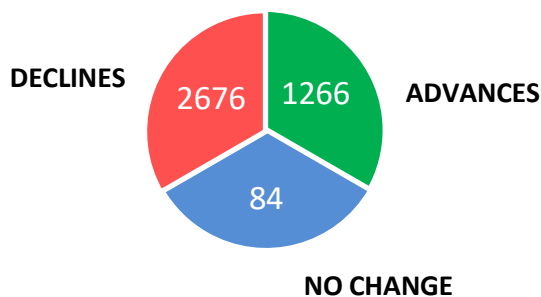
- **Zaggle Prepaid Ocean Services (Zaggle)** has entered into an agreement with Open Network for Digital Commerce (ONDC). Zaggle and ONDC have signed agreement for facilitating the issuance of Prepaid Payment Instruments to the Customers/Sponsor Organizations for rewarding their employees, partners and consumers.
- **Hindalco Industries** has reported over 2-fold jump in net profit at Rs 1,471 crore for Q1FY25 as compared to Rs 600 crore for the same quarter in the previous year.
- **Bondada Engineering** has received an add on work order from Bharat Sanchar Nigam (BSNL) for providing infrastructure Service (IaaS) for supply and erection of GBT.
- **NMDC** has reported 20.25% rise in net profit at Rs 1,983.97 crore for Q1FY25 as compared to Rs 1,649.91 crore for the same quarter in the previous year.

### MARKET DRIVING SECTOR : METAL

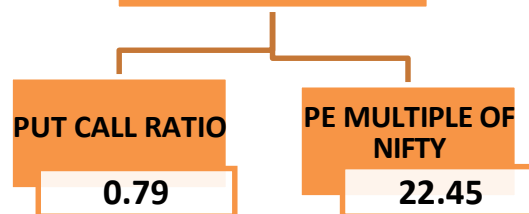


**S&P BSE: METAL**  
**CLOSING: 30,777.62**  
**CHANGE: - 426.75**  
**CHANGE: - 1.37%**

### MARKET BREADTH – NEGATIVE



### RATIO ANALYSIS



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