

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,578.38	77,711.11	77,711.11	76,802.73	77,155.79	-422.59	-0.54
NIFTY	23,518.50	23,488.45	23,507.30	23,263.15	23,349.90	-168.60	-0.72

INDICES EXTENDED LOSSES AMID WEAK GLOBAL CUES

The 30-share BSE Sensex was down by 422.59 points or 0.54% to settle at 77,155.79 and the Nifty was down by 168.60 points or 0.72% to settle at 23,349.90. The BSE Mid-Cap was down by 0.37% and BSE Small Cap was down by 0.67%. On the sectoral front, Realty, IT, Healthcare, were gaining indices; on the flip side, Oil & Gas, Consumer Durables, FMCG, Auto, Bank, Capital Goods and Metal were losing indices. Powergrid, Ultratech Cement, HCL Tech, Tata Steel and TCS were the top gainers on the Sensex; on the flip side, Adani Ports, NTPC, SBIN, ITC and Asian Paint 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	325.30	315.05	3.25
ULTRACEMCO	10,952.65	10,769.55	1.70
HINDALCO	647.65	640.00	1.20
APOLLOHOSP	6,745.95	6,686.90	0.88
GRASIM	2,530.20	2,508.15	0.88

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ADANIENT	2,160.00	2,821.50	-23.44
ADANI PORTS	1,119.05	1,289.65	-13.23
SBILIFE	1,475.00	1,522.90	-3.15
SBIN	780.90	803.00	-2.75
NTPC	357.50	366.70	-2.51

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
ADANI PORTS	4,69,26,687	1,119.05	5,071.60
ADANI ENT	2,17,96,668	2,160.00	4,913.62
HDFCBANK	1,78,58,256	1,739.95	3,113.80
RELIANCE	1,94,33,843	1,220.45	2,380.47
SBIN	2,94,86,577	780.90	2,284.47

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	5,83,98,744	140.00	816.24
ADANI PORTS	4,69,26,687	1,119.05	5,071.6
SBIN	2,94,86,577	780.90	2,284.4
POWERGRID	2,54,06,386	325.30	816.74
ADANI ENT	2,17,96,668	2,160.00	4,913.6



Indian equity markets went through hefty losses on Thursday amid escalating tensions in the Russia-Ukraine conflict and heightened the nuclear concerns. Also, some cautiousness came after a sharp sell-off in Adani group stocks as US prosecutor's indicted billionaire Gautam Adani and seven other senior business executives in connection with an alleged \$250 million bribery scheme. After making cautious start, markets extended their losses amid mixed global cues, as traders remained cautious and are reluctant to make significant moves keeping close eye on the escalating tensions between Ukraine and Russia. Investors were worried as domestic rating agency Icria said India's real GDP growth for the September quarter is likely to decline to 6.5 per cent due to heavy rains and weaker corporate performance. In afternoon session, indices continued their weak trade, some concern came as Economic Affairs Secretary Ajay Seth's statement that India's economic growth may have slowed in the September quarter, but overall, there is not much downside risk to 6.5-7 per cent growth in the current fiscal year.

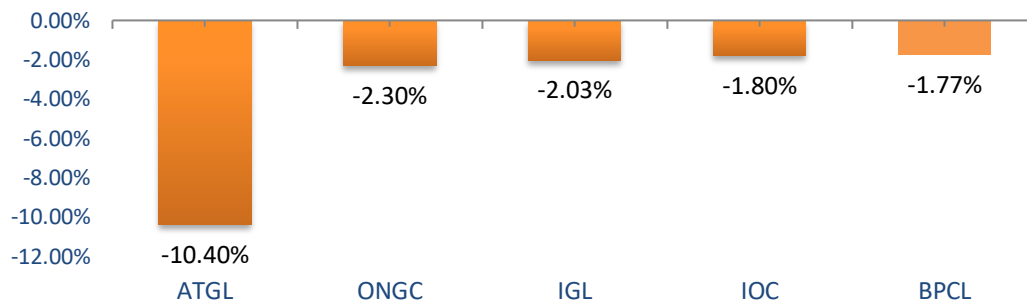
On the global front, European markets were trading lower amidst renewed tensions between Russia and Ukraine. Asian markets ended mostly in red as the People's Bank of China left its benchmark lending rates unchanged on Wednesday as it monitors the impact of recent policy adjustments.

Source: AceEquity

NEWS BULLETIN

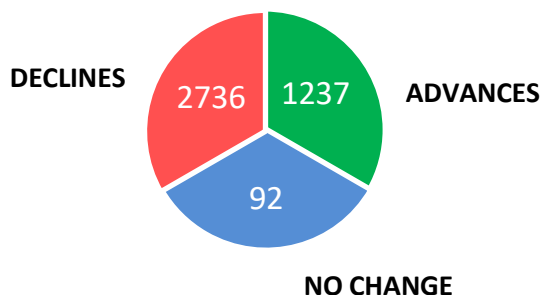
- **BEML** has secured a substantial order worth Rs 246.78 crore from Central Coalfields (CCL). The order entails the supply of 48 state-of-the-art BH60M Rear Dump Trucks, along with spares and consumables for 1+4 years and comprehensive after-sales service support.
- **Kothari Fermentation & Biochem** has received a bulk order for supplying its product, Alcomax Instant Dry Yeast to KRS Multiproducts LLP. The broad volume size of the order will be 100 MT per month for the coming six months which will amount to around Rs 20-25 crore.
- **Satrix Information Security** has bagged order to provide Splunk implementation services which includes onsite installation and commissioning services for backup and upgrade support for Splunk and Tenable to Bharti Airtel.

MARKET DRIVING SECTOR : OIL & GAS

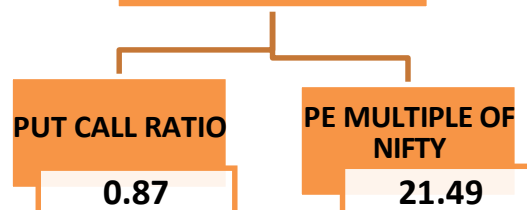


S&P BSE: OIL & GAS
CLOSING: 25,249.46
CHANGE: - 370.78
CHANGE: - 1.45 %

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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