

# COMMENTARY

09 Dec 2024

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	81,709.12	81,602.58	81,783.28	81,411.55	81,508.46	-200.66	-0.25
NIFTY	24,677.80	24,633.90	24,705.00	24,580.05	24,619.00	-58.80	-0.24

## CHOPPY SESSION ENDS WITH MINOR LOSS

The 30-share BSE Sensex was down by 200.66 points or 0.25% to settle at 81,508.46 and the Nifty was down by 58.80 points or 0.24% to settle at 24,619.00. The BSE Mid-Cap was up by 0.32% and BSE Small Cap was up by 0.46%. On the sectoral front, Capital Goods, IT, Metal, Realty and Consumer Durables were gaining indices; on the flip side, FMCG, Oil & Gas, Auto, Bank, Healthcare, were losing indices. Larsen & Toubro, Tata Steel, JSW Steel, HDFC Bank and Adani Ports were the top gainers on the Sensex; on the flip side, Hindustan Unilever, Tata Motors, Axis Bank, Asian Paint and Nestle 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 green note.

### Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
WIPRO	305.30	297.35	2.67
LT	3,954.75	3,866.70	2.28
SBILIFE	1,467.85	1,448.55	1.33
TATASTEEL	149.70	148.29	0.95
BPCL	303.05	300.35	0.90

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TATACONSUM	934.20	974.45	-4.13
HINDUNILVR	2,402.00	2,483.80	-3.29
TATAMOTORS	799.70	816.80	-2.09
NESTLEIND	2,229.00	2,267.80	-1.71
ASIANPAINT	2,392.90	2,429.70	-1.51

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,34,73,956	1,867.55	2,521.10
RELIANCE	1,46,50,002	1,296.40	1,910.51
LT	33,32,753	3,954.75	1,312.69
TATAMOTOR	1,55,73,233	799.70	1,257.65
ICICIBANK	80,00,764	1,323.50	1,058.96

### Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	3,90,59,139	149.70	580.89
TATAMOTOR	1,55,73,233	799.70	1,257.6
RELIANCE	1,46,50,002	1,296.40	1,910.5
HDFCBANK	1,34,73,956	1,867.55	2,521.1
BEL	1,18,30,104	314.45	372.80



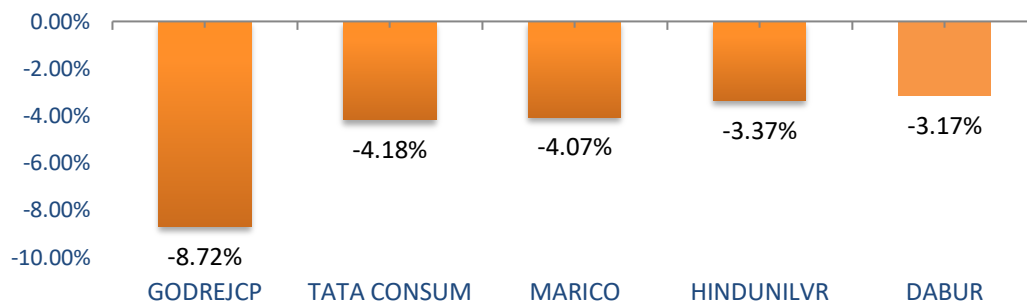
Indian equity markets ended a volatile day of trade with losses on Monday. Traders avoided to take risk ahead of key macroeconomic data i.e. inflation and industrial growth data, which are going to be out on November 12. Markets made negative start and remained lower following mixed cues from Asian counterparts pulled down by a tumbling South Korean market amid the ongoing political turmoil in the country as well as the ongoing tensions in the Middle East and the Russia - Ukraine war. Some cautiousness came as industry body CII has suggested the government to stick to the fiscal deficit target of 4.9 per cent of GDP for 2024-25 and 4.5 per cent for 2025-26, cautioning that overly aggressive targets beyond these could adversely affect India's economic growth. In late morning session, indices managed to hit green terrain but failed to hold gains and once again entered into red. Sentiments were downbeat, as SBI forecasted India's GDP growth at 6.3%, lower than RBIs projection of 6.6% for FY25 in its latest report.

On the global front, European markets were trading mostly in green amid the European Central Bank (ECB) is expected to cut interest rates again this week. Asian markets ended mixed as Chinese inflation data signaled continued demand weakness and political turmoil continued in South Korea after President Yoon survived impeachment. Source: AceEquity

## NEWS BULLETIN

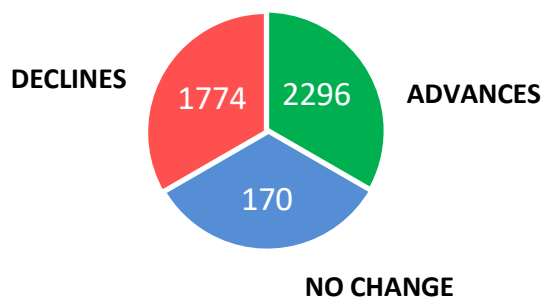
- **SIKA Interplant Systems (SIKA)** has secured significant new orders for advanced engineering products and services in the recent past. With these recent contracts, the cumulative of new orders received by SIKA since the start of FY 2024-25 is around Rs 264 crore as on December 07, 2024.
- **RailTel Corporation of India** has secured work order from Employees Provident Fund Organisation for MPLS Services for 140 Locations as per Purchase Order issued by EPFO amounting to Rs 16.22 crore (Including Tax). The said order is to be executed by March 31, 2027.
- **Roto Pumps'** subsidiary -- Roto Energy Systems has secured over 400 orders for its newly launched Solar Submersible Pumping Systems under the brand name 'Roto Rudra', reinforcing its position as a key player in sustainable water management globally.

## MARKET DRIVING SECTOR : FMCG

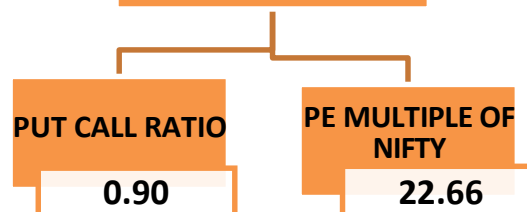


**S&P BSE: FMCG**  
**CLOSING: 20,762.45**  
**CHANGE: - 408.75**  
**CHANGE: - 1.93 %**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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