

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,583.81	78,704.60	78,735.41	78,216.25	78,271.28	- 312.53	- 0.40
NIFTY	23,739.25	23,801.75	23,807.30	23,680.45	23,696.30	- 42.95	- 0.18

A CHOPPY SESSION END WITH MINOR LOSS

The 30-share BSE Sensex was down by 312.53 points or 0.40% to settle at 78,271.28 and the Nifty was down by 42.95 points or 0.18% to settle at 23,696.30. The BSE Mid-Cap was up by 0.69% and BSE Small Cap was up by 1.42%. On the sectoral front, Oil & Gas, Capital Goods, IT, Metal and Healthcare were gaining indices; on the flip side, FMCG, Auto, Bank, Realty and Consumer Durables were losing indices. Adani Ports, IndusInd Bank, Tata Motors, HDFC Bank and Tata Steel were the top gainers on the Sensex; on the flip side, Asian Paint, Titan, Nestle, Hindustan Unilever and Larsen & Toubro 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
HINDALCO	600.90	583.95	2.90
ITCHOTELS	168.45	163.74	2.88
ONGC	261.05	254.10	2.74
APOLLOHOSP	6,958.00	6,792.20	2.44
BPCL	261.55	255.95	2.19

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ASIANPAINT	2,274.20	2,354.35	-3.40
TITAN	3,490.00	3,597.70	-2.99
NESTLEIND	2,249.45	2,299.45	-2.17
BRITANNIA	4,930.00	5,028.35	-1.96
TATACONSUM	1,014.95	1,034.20	-1.86

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,18,37,753	1,734.80	2,052.48
BAJFINANCE	18,67,493	8,497.10	1,588.81
RELIANCE	1,01,12,028	1,278.50	1,296.33
SBIN	1,34,19,162	765.5	1,035.62
INFY	49,96,744	1,899.15	950.27

Most Active (by volume)			
Name	Qty	Pr.	Value CR
BEL	1,88,18,511	288.75	545.17
ITCHOTELS	1,82,21,463	168.45	305.56
TATASTEEL	1,69,58,362	134.34	228.28
POWERGRID	1,53,37,191	286.25	440.65
SBIN	1,34,19,162	765.50	1,035.6



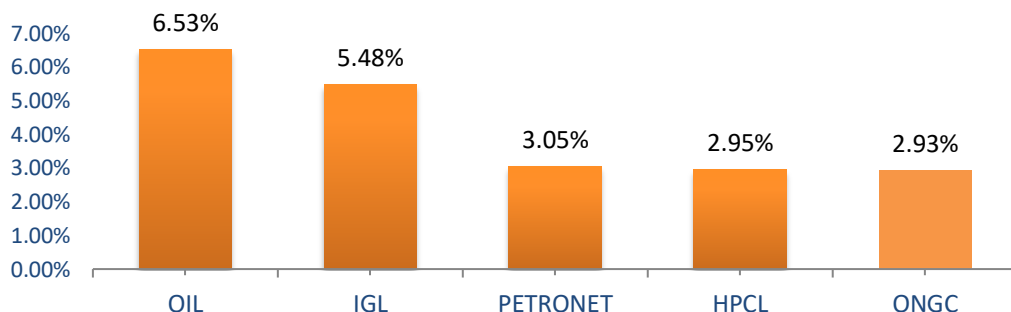
After witnessing a volatile day, Indian equity benchmarks ended Wednesday's trading session below their neutral lines, as investors remained cautious ahead of the Reserve Bank of India's monetary policy meeting outcome this week. Sentiments remained negative as India's services sector activity expanded at slowest pace in the month of January. Uncertainties over Trump's tariff policies too kept traders away from risky assets. Traders paid no attention towards a recent report by the State Bank of India (SBI) noted that the country's retail inflation is expected to decline to 4.5% in the last quarter (January-March) of the financial year 2024-25 (FY25), while the overall average inflation for the year is likely to be at 4.8%. Traders took note of S&P Global Ratings' statement that the budget for 2025-26 will boost India's growth over the next few years via domestic demand through income tax cuts and the country will achieve the targeted 4.4 per cent fiscal deficit despite hiking I-T rebate.

On Global front, European markets were trading lower, as investors react to downbeat earnings updates from Google parent Alphabet and AMD. Asian markets ended mixed, as private sector in Singapore fell into contraction territory in January, with a PMI score of 49.9. Source: AceEquity

NEWS BULLETIN

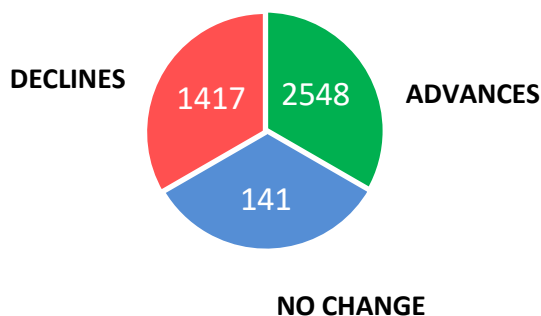
- **Happiest Minds Technologies** has reported 64.05% fall in net profit at Rs 28.70 crore for Q3FY25 as compared to Rs 79.83 crore for the same quarter in the previous year.
- **Max Financial Services** has reported net loss of Rs 1.57 crore for Q3FY25 as compared to net loss of Rs 2.47 crore for the same quarter in the previous year.
- **Apollo Micro Systems** has reported 82.39% rise in net profit at Rs 18.44 crore for Q3FY25 as compared to Rs 10.11 crore for the same quarter in the previous year.
- **Azad Engineering** has reported 44.58% rise in net profit at Rs 24.29 crore for for third quarter ended December 31, 2024 (Q3FY25) as compared to Rs 16.80 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : OIL & GAS

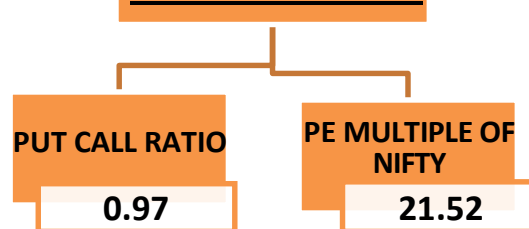


S&P BSE: OIL & GAS
CLOSING: 25,419.86
CHANGE: + 471.74
CHANGE: + 1.89 %

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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