

COMMENTARY

19 Feb 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	75,967.39	75,787.27	76,338.58	75,581.38	75,939.18	-28.21	-0.04
NIFTY	22,945.30	22,847.25	23,049.95	22,814.85	22,932.90	-12.40	-0.05

INDICES ENDED THE DAY WITH TINY CUTS

The 30-share BSE Sensex was down by 28.21 points or 0.04% to settle at 75,939.18 and the Nifty was down by 12.40 points or 0.05% to settle at 22,932.90. The BSE Mid-Cap was up by 1.30% and BSE Small Cap was up by 2.41%. On the sectoral front, Consumer Durables, Bank, FMCG, Auto, Capital Goods, Realty, Oil & Gas, and Metal were gaining indices; on the flip side, IT and Healthcare were losing indices. Zomato, Larsen & Toubro, Axis Bank, ICICI Bank and IndusInd Bank were the top gainers on the Sensex; on the flip side, TCS, Infosys, Hindustan Unilever, Sunpharma and Bharti Airtel 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
BEL	253.25	244.60	3.54
HINDALCO	627.95	611.45	2.70
EICHERMOT	4,810.00	4,719.40	1.92
AXISBANK	1,009.40	994.15	1.53
LT	3,268.95	3,220.15	1.52

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
DRREDDY	1,167.75	1,197.40	-2.48
TCS	3,785.00	3,873.20	-2.28
INFY	1,810.85	1,851.95	-2.22
HINDUNILVR	2,250.00	2,296.00	-2.00
ADANIANT	2,177.00	2,220.30	-1.95

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
TCS	43,66,672	3,785.00	1,657.80
ICICIBANK	1,06,83,412	1,261.50	1,339.60
BHARTIARTL	77,76,555	1,640.00	1,282.81
HDFCBANK	59,42,056	1,725.05	1,026.44
INFY	46,11,411	1,810.85	839.65

Most Active (by volume)			
Name	Qty	Pr.	Value CR
BEL	2,15,16,255	253.25	539.99
TATASTEEL	1,84,47,487	135.80	250.63
POWERGRID	1,46,02,009	263.25	386.46
NTPC	1,30,79,903	314.50	411.26
ICICIBANK	1,06,83,412	1,261.50	1,339.6



Indian equity benchmarks ended Wednesday’s trading session flat with negative bias as investors remained cautious due to U.S. tariff-related uncertainties. After making a negative start, soon markets turned positive as traders were optimistic after a meeting between Russian and U.S. officials raised hopes of an end to the three-year war in Ukraine. Indices erased most of its gains to trade near neutral lines in noon deals pressured by index heavyweights amid mixed global cues. Sentiments were down beat ahead of the Federal Open Market Committee (FOMC) minutes for the January policy meeting, which will be released tonight. Market participants are eyeing the FOMC minutes to get cues about the monetary policy outlook. Traders took note of report that India and Qatar have agreed to double bilateral trade to \$28 billion over the next five years and announced elevation of their relationship to the level of strategic partnership as Prime Minister Narendra Modi held talks with Amir Sheikh Tamim Bin Hamad Al-Thani.

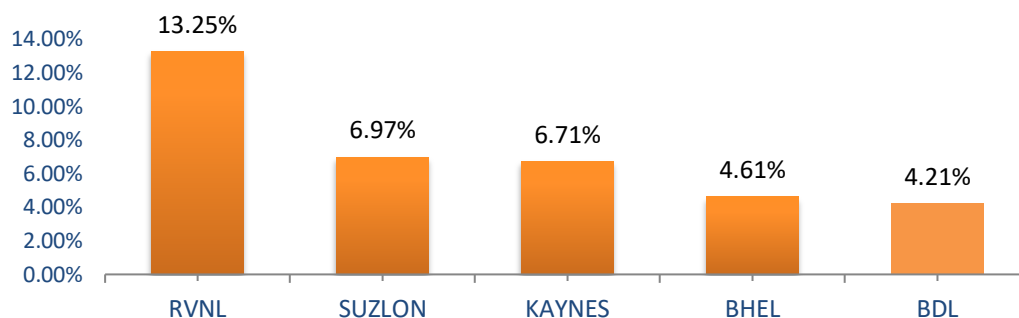
On Global front, Most of the European markets were trading in red, as U.S. President Donald Trump continued his aggressive stance on trade, reiterating that America will charge reciprocal tariff to trading partners which would be 'no more, no less' levied by other countries.

Source: AceEquity

NEWS BULLETIN

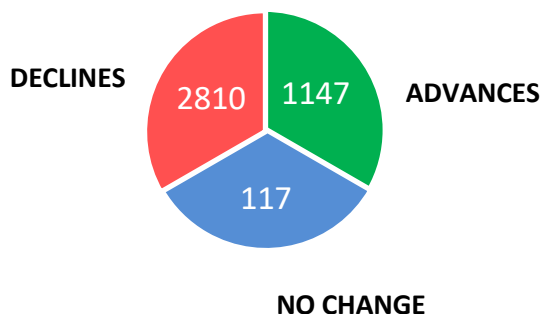
- **Apollo Micro Systems** has received orders worth Rs 12.07 crore from a private company and has been declared the lowest bidder for orders worth Rs. 5.97 crore from Ministry of Defence.
- **Ashok Leyland** has bagged an order worth Rs 297.85 crore for supplying 320 BS VI Diesel Fuel type 12M low floor fully built buses to Tamil Nadu State Transport Corporation.
- **Shashijit Infraprojects** has received a Letter of Intent (LoI) for civil work from M/s Silverbell Realty, valued at Rs 23.59 crore (exclusive of taxes) for their Vapi site. The order is to be executed within 24-30 months.
- **Oriental Rail Infrastructure** has secured orders worth Rs 3.94 crore from Integral Coach Factory (ICF), Chennai, Indian Railways for Supply and Installation of 1063 Nos. of 3-Seater Complete Stainless Steel (Double) for EMU/3 PH Coaches.

MARKET DRIVING SECTOR : CAPITAL GOODS

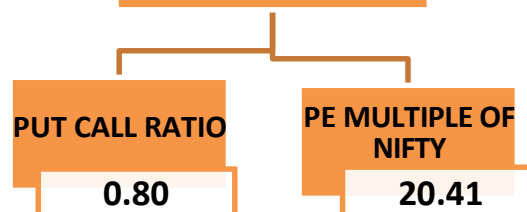


S&P BSE: CAPITAL GOODS
CLOSING: 57,780.05
CHANGE: + 1,236.96
CHANGE: + 2.19 %

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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