

21 Feb 2025



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	75,735.96	75,612.61	75,748.72	75,112.41	75,311.06	- 424.90	- 0.56
NIFTY	22,913.15	22,857.20	22,921.00	22,720.30	22,795.90	- 117.25	- 0.51

INDICES CLOSED THE WEEK IN RED NOTE

The 30-share BSE Sensex was down by 424.90 points or 0.56% to settle at 75,311.06 and the Nifty was down by 117.25 points or 0.51% to settle at 22,795.90. The BSE Mid-Cap was down by 1.18% and BSE Small Cap was down by 0.43%. On the sectoral front, Metal were gaining index; on the flip side, Auto, IT, Healthcare, Capital Goods, Realty, Oil & Gas Consumer Durables, Bank and FMCG were losing indices. Tata Steel, Larsen & Toubro, HCL Tech, Asian Paint and HDFC Bank were the top gainers on the Sensex; on the flip side, Mahindra & Mahindra, Adani Ports, Tata Motors, Sunpharma and Powergrid 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	652.15	638.80	2.09
TATASTEEL	140.60	138.04	1.85
EICHERMOT	4,968.00	4,888.40	1.63
LT	3,315.50	3,275.80	1.21
SBILIFE	1,480.55	1,469.80	0.73

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
M&M	2,663.50	2,839.45	-6.20
BPCL	251.70	258.60	-2.67
ADANIPOINTS	1,082.00	1,111.70	-2.67
TATAMOTORS	672.40	689.80	-2.52
ADANIENIT	2,125.00	2,179.00	-2.48

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
M&M	89,40,621	2,663.50	2,408.62
HDFCBANK	78,40,470	1,690.00	1,322.08
TATAMOTOR	1,45,77,524	672.40	987.74
ICICIBANK	77,86,428	1,232.00	960.21
BHARTIARTL	54,47,583	1,636.75	894.78

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	4,19,87,785	140.60	588.58
BEL	1,65,94,628	255.00	427.33
TATAMOTOR	1,45,77,524	672.40	987.74
NTPC	1,08,09,296	325.00	354.16
POWERGRID	1,07,57,025	261.60	281.47



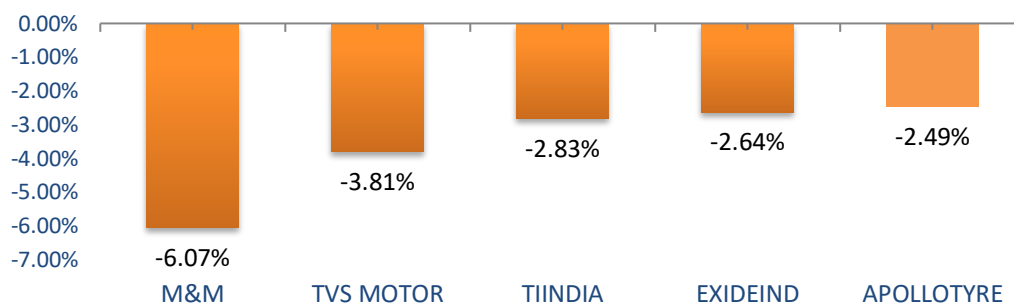
Indian equity markets witnessed selling pressure on Friday, with the Nifty 50 index ending below the 22,800 mark, as investors were cautious due to ongoing selling by FIIs and ahead of monetary policy meeting minutes, which is due later in day. Markets made a negative start, as traders seemed cautious and awaited clarity on US President Donald Trump's trade policies and the outcome of Ukraine peace talks. Trump's harsh criticism of Ukrainian President Zelenskyy heightened tensions in the ongoing conflict. Soon, markets extended their losses and remained lower till end of the day. Traders were concerned as Moody's Analytics said India's growth will slow to 6.4 per cent in 2025, from 6.6 per cent in 2024, as new US tariffs and softening global demand weigh on exports. Traders failed to get relief with reports stating that private sector output in India increased at the fastest pace in six months during February, amid a quicker expansion in services activity.

On Global front, Most of the European markets were trading higher on Friday as Germany's manufacturing sector improved more-than-expected in February, while services sector activity deteriorated slightly. Asian markets ended in green, supported by the positive cues from US markets. Better than expected corporate earnings and economic growth in emerging market kindled the investor sentiments. Source: AceEquity

NEWS BULLETIN

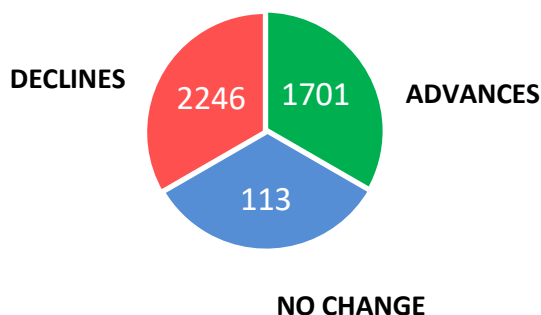
- **One97 Communications (Paytm)** has launched its 'Paytm Solar Soundbox' for merchants, a first-of-its-kind in India. This innovative device requires minimal sunlight for a quick charge that provides full-day power, enabling uninterrupted payments and reliable, consistent service for India's small shop owners and merchants.
- **Action Construction Equipment (ACE)** has secured the largest order in its history, reinforcing its commitment to the Government of India's 'Make in India' and 'Aatma Nirbhar Bharat' initiatives.
- **NACDAC Infrastructure** has acquired Tender for 'Construction of Warehouse at Village Hawal, Block Dhaulana, District Hapur, U.P.' from principle client Swiftstack Warehousing Solutions. The total work contract is for Rs 17.73 crore.

MARKET DRIVING SECTOR : AUTO

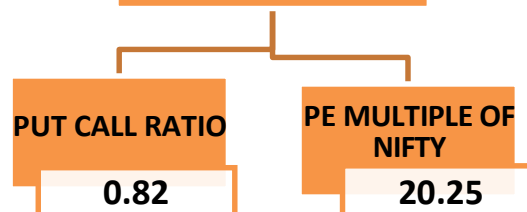


S&P BSE: AUTO
CLOSING: 48,135.32
CHANGE: - 1,284.05
CHANGE: + 2.60 %

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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