

26 Mar 2025



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,017.19	78,021.45	78,167.87	77,194.22	77,288.50	-728.69	-0.93
NIFTY	23,668.65	23,700.95	23,736.50	23,451.70	23,486.85	-181.80	-0.77

## PROFIT BOOKING SEEN AT HIGHER LEVELS

The 30-share BSE Sensex was down by 728.69 points or 0.93% to settle at 77,288.50 and the Nifty was down by 181.80 points or 0.77% to settle at 23,486.85. The BSE Mid-Cap was down by 0.67% and BSE Small Cap was down by 1.45%. On the sectoral front, Capital Goods was gaining index; on the flip side, Oil & Gas, IT, Consumer Durables, FMCG, Healthcare, Auto, Realty, Metal and Bank were losing indices. IndusInd Bank, HCL Tech, Mahindra & Mahindra, Titan and Powergrid were the top gainers on the Sensex; on the flip side, NTPC, Zomato, Tech Mahindra, Bajaj Finance and Axis Bank 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
INDUSINDBK	658.30	637.05	3.34
TRENT	5,308.00	5,185.05	2.37
HEROMOTO	3,653.00	3,627.95	0.69
GRASIM	2,585.00	2,569.45	0.61
POWERGRID	292.30	291.00	0.45

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
NTPC	354.05	366.95	-3.52
TECHM	1,410.50	1,455.50	-3.09
CIPLA	1,473.50	1,511.20	-2.49
AXISBANK	1,094.00	1,118.55	-2.19
BAJFINANCE	8,870.00	9,067.25	-2.18

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,22,39,221	1,803.00	2,220.33
RELIANCE	1,20,74,747	1,270.90	1,544.40
INDUSINDBK	2,35,06,399	658.30	1,540.94
ICICIBANK	1,08,59,639	1,335.45	1,456.83
BHARTIARTL	71,42,394	1,733.10	1,244.31

### Most Active (by volume)

Name	Qty	Pr.	Value CR
BEL	2,38,69,923	299.25	720.44
INDUSINDBK	2,35,06,399	658.30	1,540.9
TATASTEEL	2,31,82,869	155.07	362.67
POWERGRID	2,03,67,015	292.30	597.08
NTPC	1,86,68,095	354.05	671.08



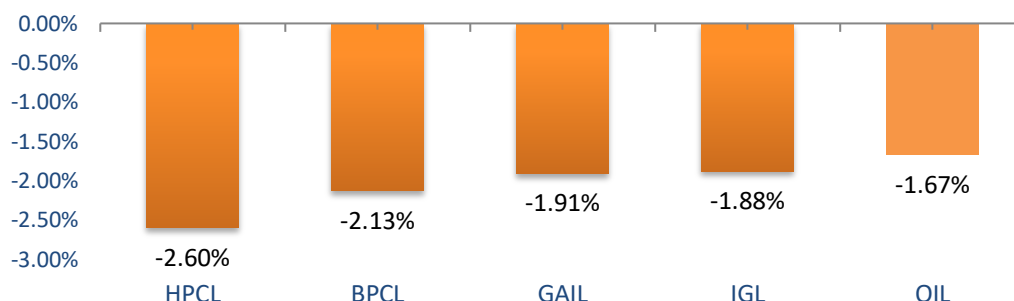
Indian equity markets experienced a downturn, snapping their seven-day winning streak, as global uncertainties and sectoral weakness weighed on sentiment. Indices made a cautious start, as investors waited for more clarity on how the US reciprocal tariffs, which will take effect on April 2, 2025, will impact the domestic economy. In the afternoon session, markets slipped deep into the red and continued to trade lower, pressured by heavy selling in banking and financial stocks. Some concern also came as S&P Global Ratings cut India's GDP growth projections to 6.5 per cent for the next fiscal as it expects that economies in the APAC region will feel the strain of rising US tariffs and pushback on globalisation. Traders overlooked Minister of State for Commerce and Industry Jitin Prasada's statement that India and the US would focus on increasing market access, reducing import duty and non-tariff barriers, and enhancing supply chain integration in the proposed bilateral trade agreement.

On Global front, European markets were trading in red, ahead of a looming deadline for implementing additional U.S. tariffs. Most of the Asian markets ended in green, even as deteriorating U.S. consumer confidence in the face of tariff fears coincided with economists' forecasts suggesting a risk of stagflation and rising odds of recession.  
Source: AceEquity

## NEWS BULLETIN

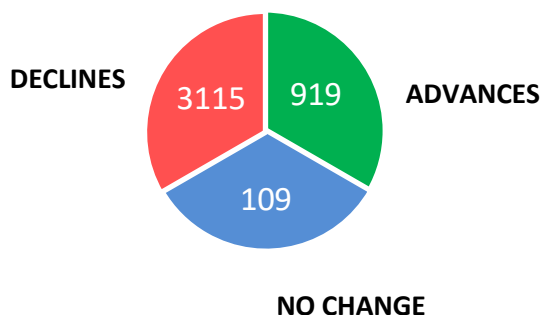
- **Bharat Dynamics** has signed a contract worth Rs 4362.23 crore with Ministry of Defence for supply of armaments to Indian Armed forces.
- **HCL Technologies** has launched HCLTech Insight, an agentic AI-powered Industry Focused Repeatable Solution (IFRS) designed to equip manufacturers with advanced data insights and analytics capabilities.
- **Ultracab (India)** has received a contract from Adani Electricity, Mumbai for supply of LT PVC cables of various sizes. The broad consideration or size of the order is Rs 9.70 crore. The supply will be completed on or before March 2026.
- **Valiant Communications** has bagged order worth Rs 7.00 crore (\$811,000) from USA and European Power Utilities for supply of communication, protection and synchronization solutions as per the technical requirements.

## MARKET DRIVING SECTOR : OIL & GAS

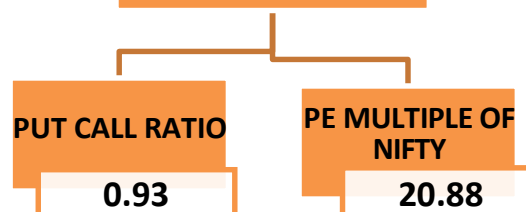


**S&P BSE: OIL & GAS**  
**CLOSING: 24,727.31**  
**CHANGE: - 382.50**  
**CHANGE: - 1.52 %**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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