

01 Apr 2025



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,414.92	76,882.58	77,487.05	75,912.18	76,024.51	-1,390.41	-1.80
NIFTY	23,519.35	23,341.10	23,565.15	23,136.40	23,165.70	-353.65	-1.50

BOURSES SHUT THE DAY IN DEEP RED AMID FOREIGN FUND OUTFLOW

The 30-share BSE Sensex was down by 1,390.41 points or 1.80% to settle at 76,024.51 and the Nifty was down by 353.65 points or 1.50% to settle at 23,165.70. The BSE Mid-Cap was down by 1.04% and BSE Small Cap was up by 0.07%. On the sectoral front, Oil & Gas were gaining index; on the flip side, Realty, Capital Goods, Auto, IT, Consumer Durables, Bank, FMCG, Healthcare, and Metal were losing indices. IndusInd Bank and Zomato were the top gainers on the Sensex; on the flip side, HCL Tech, Bajaj Finserv, HDFC Bank, Bajaj Finance and Infosys 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
INDUSINDBK	682.70	649.85	5.06
TRENT	5,568.10	5,325.15	4.56
JIOFIN	230.94	227.51	1.51
BAJAJ-AUTO	7,975.00	7,878.85	1.22
HEROMOTO	3,767.00	3,722.95	1.18

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
HCLTECH	1,534.50	1,592.50	-3.64
BEL	290.90	301.32	-3.47
BAJAJFINSV	1,941.90	2,007.35	-3.26
HDFCBANK	1,769.90	1,828.20	-3.19
HINDALCO	663.50	682.45	-2.78

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,42,55,503	1,769.90	2,539.96
INFY	1,26,80,733	1,530.20	1,939.40
ICICIBANK	1,42,88,024	1,318.15	1,895.76
RELIANCE	1,20,99,648	1,254.00	1,525.41
ZOMATO	6,33,69,467	203.35	1,279.30

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ZOMATO	6,33,69,467	203.35	1,279.3
BEL	3,31,71,384	290.90	989.04
TATASTEEL	2,91,42,122	153.25	447.07
JIOFIN	1,87,81,790	230.94	430.07
NTPC	1,87,36,320	352.95	664.22



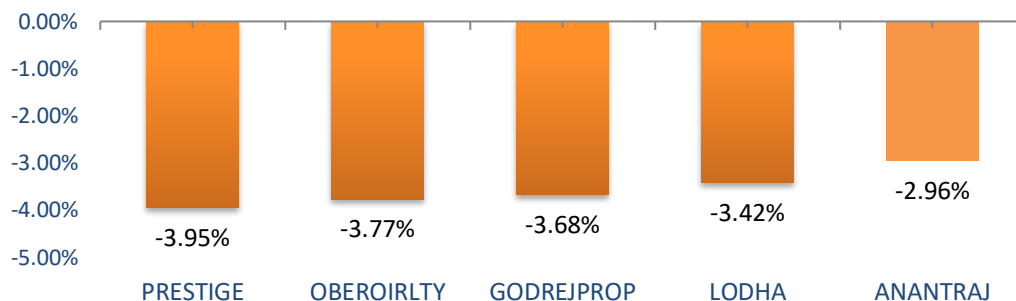
Indian equity markets faced heavy selling pressure on the first trading session of the financial year 2025-26. Both indices, Nifty and Sensex, settled with a loss of around 1.5% each, reflecting broad-based declines across various sectors. Indices made a negative start as traders were cautious ahead of U.S. reciprocal tariff announcements on April 2. During the afternoon session, the markets slipped further into the deep red and ended the day lower, amid foreign fund outflows. Investors were worried as Finance ministry in its latest report has said that India's external debt increased by 10.7 per cent to \$717.9 billion at the end of December 2024 from \$648.7 billion in December 2023. Traders were cautious with the Ministry of Commerce & Industry's latest data showed that the output of eight key infrastructure sectors slowed down to a five-month low of 2.9 per cent in February 2025, as against 7.1 per cent growth registered a year ago.

On Global front, European markets were trading in the green as investors digested regional business activity data, the euro area unemployment report, and the preliminary report on Eurozone inflation. Asian markets ended mostly in the green as China's manufacturing sector expanded at the fastest pace in four months in March as output accelerated on the back of a sustained improvement in new orders. Source: AceEquity

NEWS BULLETIN

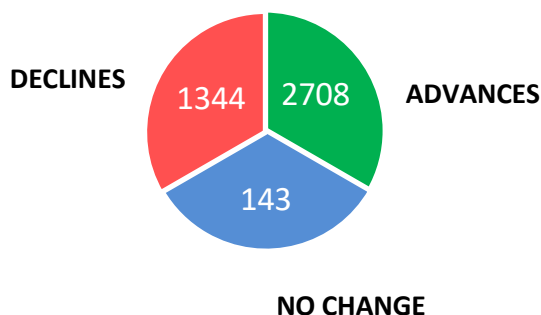
- **Mahindra & Mahindra's (M&M)** Farm Equipment Sector (FES) has reported 34% rise in total tractor sales (Domestic + Exports) during March 2025 at 34934 units, as against 26024 units for the same period last year.
- **KEC International** has secured new orders of Rs 1,236 crore across various businesses. Transmission & Distribution (T&D) business has secured orders for T&D projects in India and Middle East.
- **VST Tillers Tractors** has sold total 7892 power tillers & tractors during March 2025 as compared to 4823 units in March 2024, a rise of 63.63% Year-on-Year (YoY). Of the total, the company has sold 7221 power tillers in March 2025 as against 4061 units in March 2024, registering a rise of 77.81% YoY.

MARKET DRIVING SECTOR : REALTY

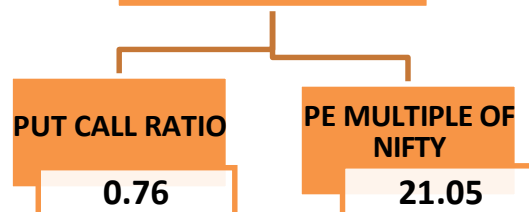


S&P BSE: REALTY
CLOSING: 6,400.27
CHANGE: - 201.31
CHANGE: - 3.05 %

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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