

24<sup>th</sup> April 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,116.49	80,058.43	80,173.92	79,724.55	79,801.43	-315.06	-0.39
NIFTY	24,328.95	24,277.90	24,347.85	24,216.15	24,246.70	-82.25	-0.34

## INDICES SNAPPED SEVEN DAY'S WINNING STREAK

The 30-share BSE Sensex was down by 315.06 points or 0.39% to settle at 79,801.43 and the Nifty was down by 82.25 points or 0.34% to settle at 24,246.70. The BSE Mid-Cap was down by 0.16% and BSE Small Cap was down by 0.01%. On the sectoral front, Metal and Healthcare were gaining indices; on the flip side, Realty, IT, FMCG, Auto, Oil & Gas, Capital Goods, Consumer Durables and Bank were the losing indices. IndusInd Bank, Ultratech Cement, Tata Motors, Tech Mahindra and Sunpharma were the top gainers on the Sensex; on the flip side, Hindustan Unilever, Bharti Airtel, ICICI Bank, Eternal and Mahindra & Mahindra were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a negative note.

### Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
INDUSINDBK	819.35	794.20	3.17
ULTRACEMCO	12,175.00	11,949.00	1.89
GRASIM	2,730.50	2,685.60	1.67
DRREDDY	1,204.90	1,186.00	1.59
CIPLA	1,554.00	1,533.70	1.32

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HINDUNILVR	2,324.00	2,423.80	-4.12
BHARTIARTL	1,846.10	1,881.60	-1.89
EICHERMOT	5,632.00	5,740.00	-1.88
ICICIBANK	1,401.00	1,424.40	-1.64
ETERNAL	236.80	239.24	-1.02

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,29,65,877	1,914.90	2,485.21
ICICIBANK	1,56,78,099	1,401.00	2,207.21
INDUSINDBK	2,25,77,201	819.35	1,860.14
BAJFINANCE	18,49,671	9,290.00	1,733.90
HINDUNILVR	70,65,430	2,324.00	1,665.84

### Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	4,61,03,369	236.80	1,096.2
ITC	2,60,64,089	429.85	1,125.4
TATASTEEL	2,30,61,444	141.44	326.00
WIPRO	2,30,00,820	242.70	559.03
INDUSINDBK	2,25,77,201	819.35	1,860.1



Indian equity markets snapped seven day's winning streak on monthly F&O expiry day, with both the Nifty and Sensex closing below their neutral line, as investors reacted to mixed signals from the Trump administration on its plans for China tariffs. Indices made flat-to-negative start, amid escalating geopolitical tensions between India and Pakistan following the Pahalgam terror attack. However, downside remained capped supported by sustained foreign institutional investor (FII) buying. In afternoon session, indices extended their losses to end in negative terrain dragged by profit booking in most of the heavyweights' stocks. Traders remained cautious as the World Bank in its latest 'South Asia Development Update' has lowered India's economic growth forecast for 2025-26 by 40 basis points to 6.3 per cent, over global economic weakness and policy uncertainty. Some cautiousness came as Finance Secretary Ajay Seth reportedly said the direct hit from tariffs introduced by Donald Trump's administration on India could shave off between 0.2% and 0.5% from GDP growth.

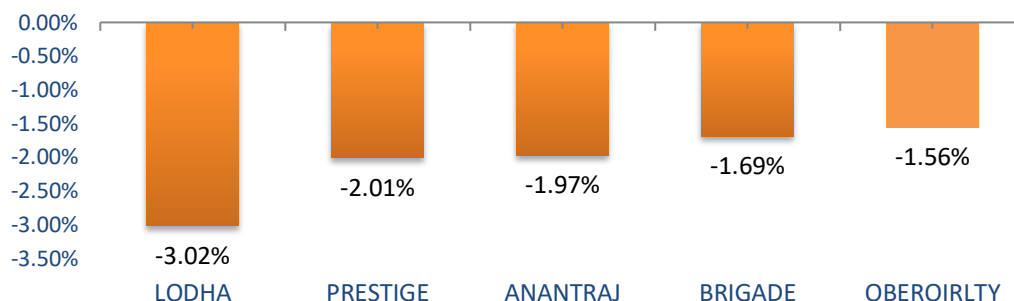
On Global front, European markets were trading in red amid uncertainty about U.S. tariffs on China and other countries, and on a mixed batch of earnings updates from European companies.

Source: AceEquity

## NEWS BULLETIN

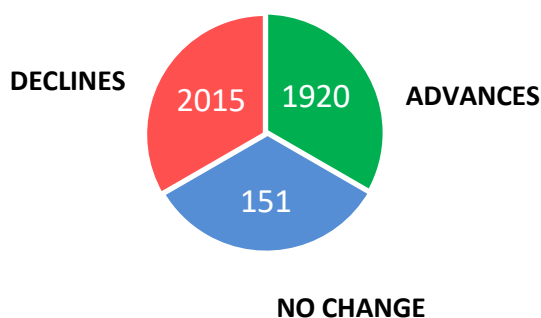
- **Kaka Industries** is all set to develop Captive Open Access Solar Power Plant with a capacity of 7.5 MW. The project requiring investment of Rs 25 crore is proposed to be completed within 10 months from grid connectivity approval.
- **Nestle India** has reported 5.22% fall in its net profit at Rs 885.41 crore for the quarter under review as compared to Rs 934.17 crore for the same quarter in the previous year. However, total income of the company increased by 4.12% at Rs 5,512.32 crore for Q4FY25 as compared Rs 5,294.34 crore for the corresponding quarter previous year.
- **Dalmia Bharat** has reported 7-fold jump in its net profit at Rs 77.00 crore for the quarter under review as compared to Rs 11.00 crore for the same quarter in the previous year.

## MARKET DRIVING SECTOR : REALTY



**S&P BSE: REALTY**  
**CLOSING: 6,857.98**  
**CHANGE: -96.94**  
**CHANGE: -1.39%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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