

22<sup>th</sup> May 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	81,596.63	81,323.05	81,323.24	80,489.92	80,951.99	-644.64	-0.79
NIFTY	24,813.45	24,733.95	24,737.50	24,462.40	24,609.70	-203.75	-0.82

## PROFIT BOOKING SEEN AT HIGHER LEVELS

The 30-share BSE Sensex was down by 644.64 points or 0.79% to settle at 80,951.99 and the Nifty was down by 203.75 points or 0.82% to settle at 24,609.70. The BSE Mid-Cap was down by 0.33% and BSE Small Cap was up by 0.17%. On the sectoral front, there were no gaining index; on the flip side, FMCG, Capital Goods, Auto, Realty, Bank, Metal, IT, Healthcare, Oil & Gas, Consumer Durables were losing indices. IndusInd Bank, Bharti Airtel and Ultratech cement were the top gainers on the Sensex; on the flip side, Mahindra & Mahindra, Bajaj Finserv, Tech Mahindra, Powergrid and ITC 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 positive note.

### Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
INDUSINDBK	783.50	769.95	1.76
JSWSTEEL	1,008.00	1,000.90	0.71
BAJAJ-AUTO	8,744.00	8,687.50	0.65
BHARTIARTL	1,831.00	1,822.50	0.47
HEROMOTO	4,272.10	4,263.80	0.19

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ONGC	242.10	248.68	-2.65
M&M	3,016.00	3,090.70	-2.42
HINDALCO	649.55	663.00	-2.03
WIPRO	246.05	250.92	-1.94
TRENT	5,346.00	5,443.50	-1.79

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
INDUSINDBK	4,34,77,564	783.50	3,360.55
HDFCBANK	1,06,53,335	1,924.00	2,039.93
RELIANCE	1,21,34,466	1,411.50	1,707.14
BEL	4,34,86,783	383.50	1,665.67
BHARTIARTL	64,96,923	1,831.00	1,188.90

### Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	6,07,15,453	161.50	983.71
BEL	4,34,86,783	383.50	1,665.6
INDUSINDBK	4,34,77,564	783.50	3,360.5
ETERNAL	2,87,95,944	229.87	658.85
POWERGRID	2,61,58,839	292.00	756.93



Indian equity benchmarks witnessed sluggish trading session on Thursday, with both the Nifty and Sensex closing into red with notable losses, amid weak global cues. Markets made a negative start and remained subdued throughout the session, as a deteriorating U.S. fiscal outlook and poor response to the 20-year bond auction led to a spike in bond yields. Selling was seen across sectors, with auto and consumer goods stocks leading the decline. However, markets showed some recover in the dying hours of trade amid weekly expiry of F&O. Traders paid no heed towards the HSBC Flash India PMI report that has showed private sector growth in India moved up a gear during May, boosted by acceleration in the service economy. The HSBC Flash India Composite Output Index surged to 61.2 in May from a final reading of 59.7 in April. The HSBC Flash India Manufacturing PMI index also rose to 58.3 in May from 58.2 in April. Traders overlooked report that Fitch Ratings has raised India's average annual growth potential till 2028 to 6.4 per cent, from 6.2 per cent estimated in November 2023.

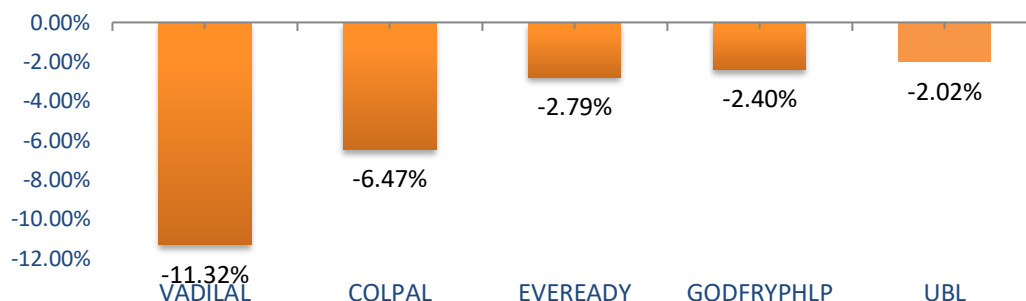
On Global front, European markets were trading in red on Thursday, as investors reacted to a U.S. Treasury sell-off, mixed regional data and some disappointing earnings.

Source: AceEquity

## NEWS BULLETIN

- **Oil India** has reported 21.56% decline in its net profit at Rs 1591.48 crore for the quarter under review as compared to Rs 2028.83 crore for the same quarter in the previous year. The total income of the company decreased by 6.18% at Rs 6182.79 crore for Q4FY25 as compared to Rs 6589.91 crore for the corresponding quarter previous year.
- **Gulf Oil Lubricants India** has reported 7.25% rise in its net profit at Rs 91.62 crore for the quarter under review as compared to Rs 85.43 crore for the same quarter in the previous year.
- **InterGlobe Aviation** has reported 62.28% jump in its net profit at Rs 3073.40 crore for the quarter under review as compared to Rs 1893.90 crore for the same quarter in the previous year.

## MARKET DRIVING SECTOR : FMCG



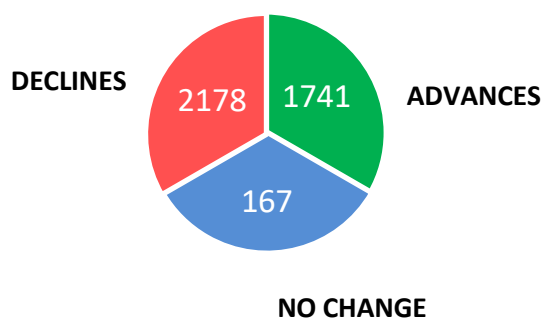
**S&P BSE: FMCG**

**CLOSING: 20,355.64**

**CHANGE: - 256.82**

**CHANGE: - 1.25%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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