

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,176.45	82,038.20	82,410.52	81,121.70	81,551.63	-624.82	-0.76
NIFTY	25,001.15	24,956.65	25,062.90	24,704.10	24,826.20	-174.95	-0.70

## INDICES TRADED IN A RANGE

The 30-share BSE Sensex was down by 624.82 points or 0.76% to settle at 81,551.63 and the Nifty was down by 174.95 points or 0.70% to settle at 24,826.20. The BSE Mid-Cap was up by 0.18% and BSE Small Cap was up by 0.19%. On the sectoral front, Capital Goods, Realty, Consumer Durables, and Healthcare were gaining indices; on the flip side, FMCG, Auto, Oil & Gas, IT, Bank and Metal were losing indices. IndusInd Bank, Sunpharma, Adani Ports, Nestle and Asian Paint were the top gainers on the Sensex; on the flip side, Ultratech Cement, ITC, Tata Motors, Axis Bank and NTPC 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
JIOFIN	292.65	281.75	3.87
INDUSINDBK	821.00	800.10	2.61
TRENT	5,570.00	5,526.00	0.80
ADANIPTS	1,404.80	1,400.20	0.33
SUNPHARMA	1,681.50	1,676.10	0.32

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ULTRACEMCO	11,422.00	11,689.00	-2.28
JSWSTEEL	1,011.40	1,032.30	-2.02
ITC	434.70	442.90	-1.85
TATAMOTORS	717.00	729.00	-1.65
GRASIM	2,613.00	2,656.40	-1.63

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
ETERNAL	22,46,59,198	224.95	5,049.44
HDFCBANK	1,30,81,074	1,926.80	2,520.87
ICICIBANK	1,48,42,959	1,445.30	2,145.67
RELIANCE	1,26,40,414	1,424.20	1,797.21
INFY	77,75,714	1,570.90	1,219.07

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ETERNAL	22,46,59,198	224.95	5,049.4
ITC	2,69,86,022	434.70	1,177.6
NTPC	2,49,37,330	338.50	843.93
JIOFIN	2,44,00,393	292.65	701.36
TATASTEEL	2,32,96,776	161.76	377.55



Local equity benchmarks ended sharply lower on Tuesday, weighed down by weak cues from Asian markets along with a broad-based sell-off across sectors. Markets made a negative start, as investors remained cautious ahead of key economic data releases, including industrial and manufacturing production figures for April due on Wednesday. Markets recovered from their initial losses during the late morning session, but failed to hold gains and closed with significant losses. Traders overlooked NITI Aayog member Arvind Virmani's statement that India is set to become the fourth largest economy in the world by overtaking Japan by the end of 2025. Traders failed to take any sense of relief with report that the Government of India has restored benefits under the Remission of Duties and Taxes on Exported Products (RoDTEP) scheme for exports made by Advance Authorization (AA) holders, Export-Oriented Units (EOUs), and units operating in Special Economic Zones (SEZs).

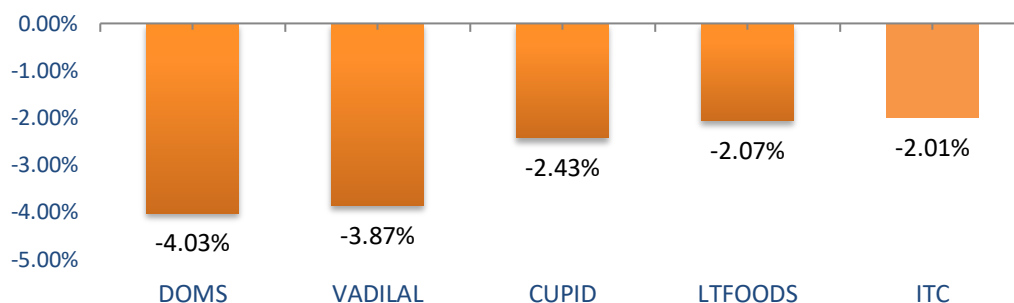
On Global front, European markets were trading in green amid continued optimism surrounding the delay of U.S. President Donald Trump's proposed 50 percent tariff on EU imports. Asian markets ended mixed even after China's industrial profits increased in April despite higher US trade tariffs.

Source: AceEquity

## NEWS BULLETIN

- **General Insurance Corporation of India** has reported 17.39% decline in its net profit at Rs 2,182.89 crore for the quarter under review as compared to Rs 2,642.48 crore for the same quarter in the previous year.
- **Blue Dart Express** has reported 30.02% fall in its net profit at Rs 53.22 crore for fourth quarter (Q4) ended March 31, 2025 as compared to Rs 76.05 crore for the same quarter in the previous year.
- **KEC International** has reported 72.90% rise in its net profit at Rs 160.68 crore for the quarter under review as compared to Rs 92.93 crore for the same quarter in the previous year.
- **Gillette India** has reported 60.14% jump in net profit at Rs 158.68 crore for the third quarter ended March 31, 2024 (Q3) as compared to Rs 99.09 crore for the same quarter in the previous year.

## MARKET DRIVING SECTOR : FMCG



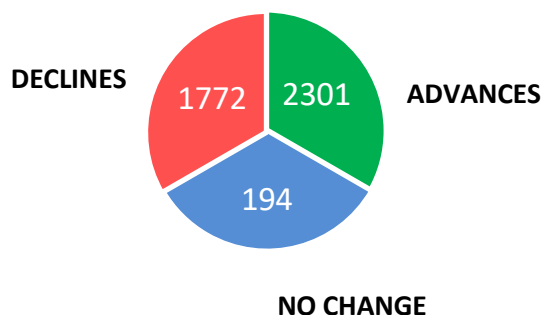
**S&P BSE: FMCG**

**CLOSING: 20,687.85**

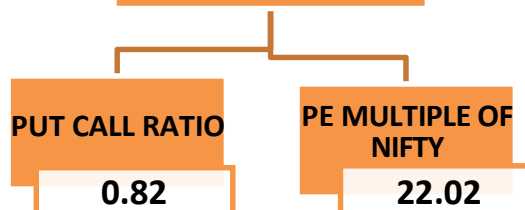
**CHANGE: - 163.69**

**CHANGE: - 0.79%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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