

# COMMENTARY

28<sup>th</sup> May 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	81,551.63	81,457.61	81,613.36	81,244.02	81,312.32	-239.31	-0.29
NIFTY	24,826.20	24,832.50	24,864.25	24,737.05	24,752.45	-73.75	-0.30

## BENCHMARKS END WITH TINY LOSS

The 30-share BSE Sensex was down by 239.31 points or 0.29% to settle at 81,312.32 and the Nifty was down by 73.75 points or 0.30% to settle at 24,752.45. The BSE Mid-Cap was down by 0.22% and BSE Small Cap was up by 0.50%. On the sectoral front, Capital Goods, Bank and Oil & Gas were gaining indices; on the flip side, FMCG, Realty, Consumer Durables, Healthcare, Auto, IT and Metal were losing indices. Bajaj Finance, Bharti Airtel, ICICI Bank, Adani Ports and HCL Tech were the top gainers on the Sensex; on the flip side, ITC, IndusInd Bank, Nestle, Ultratech Cement 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 positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
HDFCLIFE	787.55	775.80	1.51
BEL	390.30	385.40	1.27
BAJFINANCE	9,282.00	9,171.00	1.21
HEROMOTO	4,376.00	4,338.20	0.87
BHARTIARTL	1,855.50	1,843.80	0.63

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
INDUSINDBK	804.90	820.70	-1.93
APOLLOHOSP	6,940.00	7,073.50	-1.89
ULTRACEMCO	11,213.00	11,421.00	-1.82
HINDALCO	648.60	659.45	-1.65
NESTLEIND	2,421.00	2,460.90	-1.62

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
ITC	43,18,51,622	421.00	17,925.3
HDFCBANK	90,78,797	1,928.40	1,745.78
ICICIBANK	86,18,343	1,452.90	1,252.10
JIOFIN	3,71,69,009	289.50	1,091.58
BEL	2,75,49,144	390.30	1,073.95

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ITC	43,18,51,622	421.00	17,925
ETERNAL	4,35,25,027	224.29	976.22
JIOFIN	3,71,69,009	289.50	1,091.5
BEL	2,75,49,144	390.30	1,073.9
TATASTEEL	1,30,44,476	161.06	210.41



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).

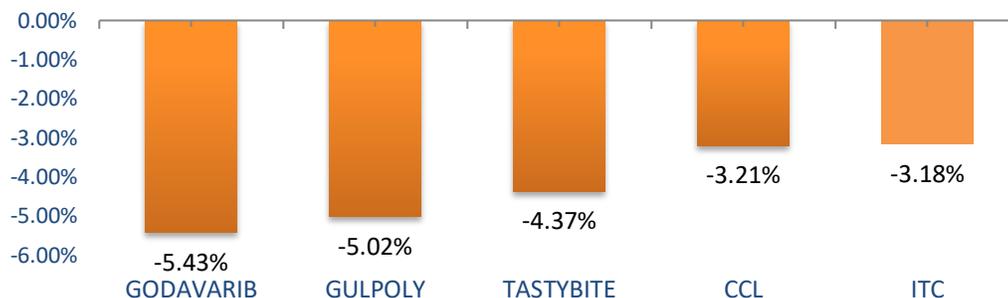
On Global front, European markets were trading in green amid continued optimism surrounding the delay of U.S. President Donald Trump's proposed 50 percent tariff on EU imports. Asian markets ended mixed even after China's industrial profits increased in April despite higher US trade tariffs.

Source: AceEquity

## NEWS BULLETIN

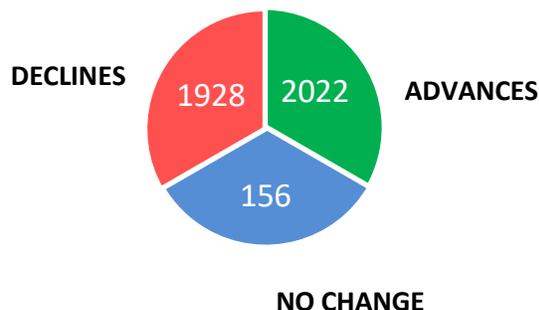
- **BASF India** has launched two new agro chemical products - Valexio Insecticide and Mibelya Fungicide. The introduction of these two innovations will help rice growers boost their rice yields by managing rice hoppers.
- **Blue Dart Express** has reported 30.02% fall in its net profit at Rs 53.22 crore 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

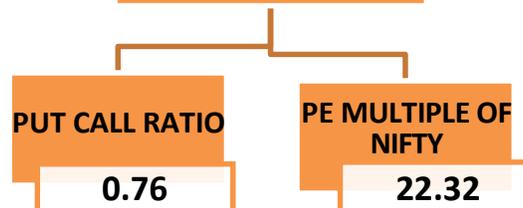


**S&P BSE: FMCG**  
**CLOSING: 20,411.89**  
**CHANGE: - 275.96**  
**CHANGE: - 1.33%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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