

02<sup>th</sup> Jun 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	81,451.01	81,214.42	81,474.26	80,654.26	81,373.75	-77.26	-0.09
NIFTY	24,750.70	24,669.70	24,754.40	24,526.15	24,716.60	-34.10	-0.14

## BENCHMARKS CLOSED ON A FLAT NOTE WITH NEGATIVE BIAS

The 30-share BSE Sensex was down by 77.26 points or 0.09% to settle at 81,373.75 and the Nifty was down by 34.10 points or 0.14% to settle at 24,716.60. The BSE Mid-Cap was up by 0.58% and BSE Small Cap was up by 0.36%. On the sectoral front, Realty, Consumer Durables, Auto, Healthcare, Capital Goods, Bank and FMCG were gaining indices; on the flip side, IT, Metal and Oil & Gas were losing indices. Adani Ports, Mahindra & Mahindra, Powergrid, Eternal and Hindustan Unilever were the top gainers on the Sensex; on the flip side, Tech Mahindra, Tata Steel, Tata Motors, Titan and HDFC Bank were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a negative note.

### Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ADANI PORTS	1,464.30	1,432.80	2.20
M&M	3,024.00	2,976.80	1.59
ETERNAL	240.92	238.31	1.10
POWERGRID	292.80	289.75	1.05
TATACONSUM	1,116.40	1,106.30	0.91

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HEROMOTO	4,221.00	4,309.30	-2.05
HDFCLIFE	765.00	776.85	-1.53
JSWSTEEL	978.80	993.50	-1.48
TECHM	1,551.00	1,573.90	-1.45
BAJAJ-AUTO	8,500.50	8,607.00	-1.24

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
SBIN	2,68,91,575	813.50	2,190.91
HDFCBANK	73,34,411	1,931.00	1,411.61
ICICIBANK	94,58,990	1,447.70	1,364.36
ETERNAL	5,56,90,205	240.92	1,340.41
RELIANCE	80,98,668	1,412.60	1,140.08

### Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	5,56,90,205	240.92	1,340.4
TATASTEEL	3,13,65,564	159.12	498.30
NTPC	2,94,79,727	332.40	977.49
SBIN	2,68,91,575	813.50	2,190.9
ITC	1,49,73,380	418.50	626.11



Indian equity benchmarks pared initial losses to close flat with negative bias amid weak global cues. Indices made a gap-down opening, as rising tensions between Russia and Ukraine. Additionally, sentiments remained downbeat amid the outflow from foreign institutional investments (FIIs). However, in the final leg of the trading session, markets recovered from their day's low point, but ended in negative terrain. Traders were cautious as India's manufacturing sector experienced a slight slowdown in May 2025, with the HSBC India Manufacturing Purchasing Managers' Index (PMI) dipping to 57.6 from 58.2 in April. Some cautiousness came as think tank GTRI said that US President Donald Trump's announcement to double tariffs on imported steel and aluminium will impact Indian exporters, as it would hurt their profitability. The government data showed that India's real GDP growth for the January-March quarter of financial year 2024-25 stood at 7.4%. The growth in Q4FY25 was lower than the 8.4% expansion in the year-ago quarter.

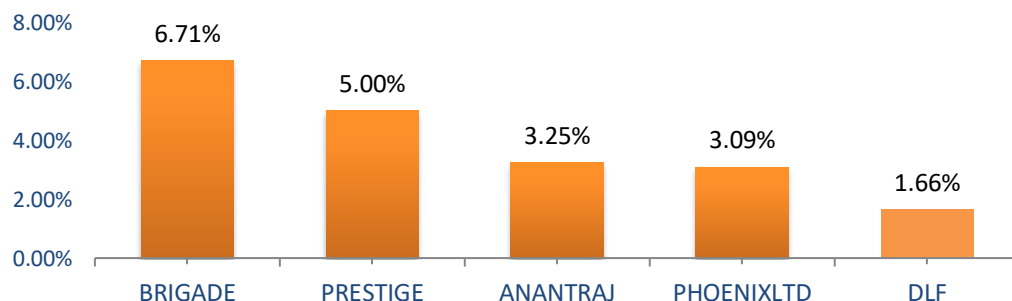
On Global front, European markets were trading in red as U.S. President Donald Trump's decision to double tariffs on steel and aluminum imports along with rising Sino-U.S. tensions threatened to rekindle global trade tensions.

Source: AceEquity

## NEWS BULLETIN

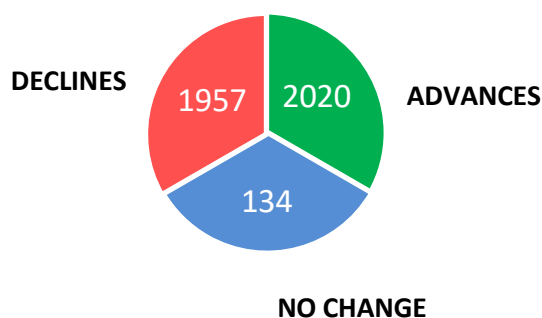
- **SPML Infra** has secured a significant new project worth Rs 258 crore from the Chennai Metropolitan Water Supply and Sewerage Board (CMWSSB). The project was awarded to the consortium of SPML Infra (26%) and JWIL Infra (74%), which successfully emerged as the lowest bidder and received the Letter of Acceptance (LoA).
- **Adani Energy Solutions (AESL)** has won a Rs 1,660 crore inter-state transmission project in Maharashtra.
- **Atul Auto** has sold 2,502 units in the month of May 2025, an 7.34% increase as compared to 2,331 units sold in May 2024. The company has reported over five-fold growth in its EV - L5 sales to 195 units in May 2025 as compared to 35 units in May 2024.

## MARKET DRIVING SECTOR : REALTY



**S&P BSE: REALTY**  
**CLOSING: 7,534.70**  
**CHANGE: + 175.27**  
**CHANGE: + 2.38%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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