

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,737.51	80,777.65	81,087.29	80,705.18	80,998.25	+260.74	+0.32
NIFTY	24,542.50	24,560.45	24,644.25	24,530.45	24,620.20	+77.70	+0.32

INDIAN BENCHMARK INDICES ENDED HIGHER

The 30-share BSE Sensex was up by 260.74 points or 0.32% to settle at 80,998.25 and the Nifty was up by 77.70 points or 0.32% to settle at 24,620.20. The BSE Mid-Cap was up by 0.76% and BSE Small Cap was up by 0.58%. On the sectoral front, FMCG, Oil & Gas, Consumer Durables, Auto, Healthcare, Capital Goods, IT, Metal were gaining indices; on the flip side, Bank and Realty were losing indices. Eternal, Bharti Airtel, Indusind Bank, Tech Mahindra and Reliance were the top gainers on the Sensex; on the flip side, Bajaj Finserv, Axis Bank, TCS, Titan and Larsen & Toubro 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
ETERNAL	245.33	237.70	3.21
JIOFIN	290.60	283.90	2.36
INDUSINDBK	815.20	800.85	1.79
TATAMOTORS	710.25	703.85	1.78
BHARTIARTL	1,873.00	1,841.30	1.72

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BAJAJFINSV	1,959.50	1,991.90	-1.63
TRENT	5,510.00	5,590.00	-1.43
EICHERMOT	5,300.00	5,354.00	-1.01
SHRIRAMFIN	642.05	648.25	-0.96
AXISBANK	1,171.70	1,181.50	-0.83

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
ETERNAL	7,06,26,622	245.33	1,717.50
HDFCBANK	64,80,771	1,939.50	1,254.37
RELIANCE	81,26,827	1,421.00	1,150.58
ICICIBANK	80,25,388	1,431.10	1,148.13
BHARTIARTL	58,92,170	1,873.00	1,103.84

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	7,06,26,622	245.33	1,717.5
BEL	2,06,48,850	390.95	801.01
TATASTEEL	1,66,60,138	158.40	263.25
NTPC	1,56,54,279	329.00	512.71
JIOFIN	1,36,40,678	290.60	392.51



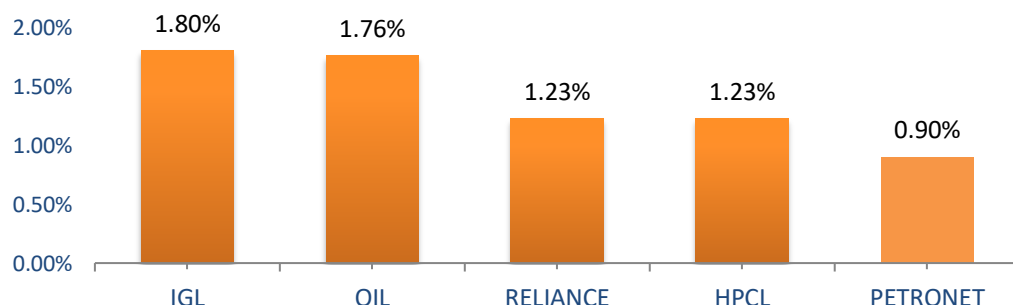
Indian markets snapped three-day losing streak and ended in green on Wednesday as investors went for fundamental strong stocks. After making positive start, markets extended their gains and remained in green till the end of the session as traders got support from positive HSBC Services PMI data. Besides, high-level US delegation will visit India on June 5-6 to advance discussions on the India-US Bilateral Trade Agreement (BTA). The visit comes amid positive progress in ongoing negotiations between the two nations. Investors took support as the seasonally adjusted HSBC India Services PMI Business Activity Index grew to 58.8 in May from 58.7 in April. However, the HSBC India Composite PMI Output Index -- which measures both manufacturing and services -- eased to 59.3 in May as against 59.7 in April. The Organisation for OECD in its latest 'Economic Outlook' has projected India's economic growth at 6.3% in FY2025-26 and 6.4% in FY2026-27. As per the report, India projected to continue to experience strong and broadly stable economic growth.

On Global front, European markets were trading higher ahead of ECB meeting. The European Central Bank (ECB) is widely expected to announce a 25-basis point reduction in its deposit rate, bringing it down to 2.00 percent, before pausing in the July meeting. Source: AceEquity

NEWS BULLETIN

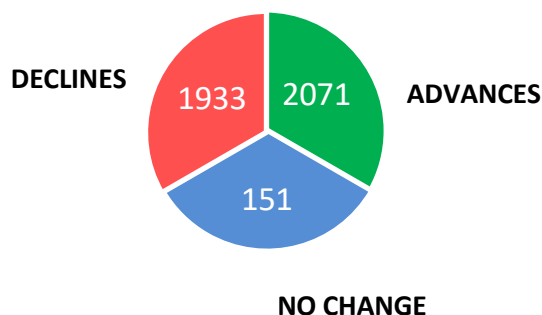
- **Bharat Electronics** has secured additional orders worth Rs 537 crore. Major orders received include communication equipment, advanced composite communication system for ship, jammers, software, simulator upgrades, spares, test rigs, services etc.
- **Western Carriers (India)** has received work order from Jindal Stainless (JSL) for hiring & trip basis of Trailers for Container Movement inside the JSL plant in Jajpur. Order value is approximately Rs 27.73 crore. The said order is expected to be completed in 2 years.
- **Chennai Petroleum Corporation (CPCL)** is setting up retail outlets for the sale of petrol and diesel, marking its re-entry into the direct fuel retail segment. An initial capital expenditure of approximately Rs 400 crore has been earmarked for this project over the next two to three years.

MARKET DRIVING SECTOR : OIL & GAS

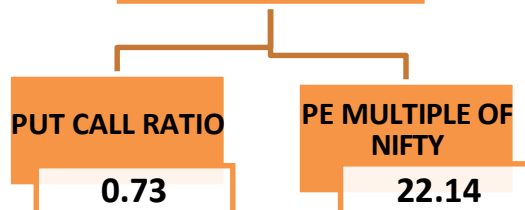


S&P BSE: OIL & GAS
CLOSING: 26,880.63
CHANGE: + 141.87
CHANGE: + 0.53%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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