

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,157.88	80,295.99	80,671.28	80,004.60	80,567.71	+ 409.83	+ 0.51
NIFTY	24,579.60	24,616.50	24,737.05	24,533.20	24,715.05	+ 135.45	+ 0.55

INDICES CLOSED POSITIVE; METAL SHINE

The 30-share BSE Sensex was up by 409.83 points or 0.51% to settle at 80,567.71 and the Nifty was up by 135.45 points or 0.55% to settle at 24,715.05. The BSE Mid-Cap was up by 0.63% and BSE Small Cap was up by 0.90%. On the sectoral front, Metal, Healthcare, FMCG, Realty, Oil & Gas, Auto, Consumer Durables, Capital Goods and Bank were gaining indices; on the flip side, IT and Bank were losing indices. Tata Steel, Titan, Mahindra & Mahindra, ITC and Eternal were the top gainers on the Sensex; on the flip side, Infosys, NTPC, Hindustan Unilever, TCS and Adani Ports 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 negative note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TATASTEEL	167.83	158.39	5.96
HINDALCO	742.70	720.95	3.02
JSWSTEEL	1,074.70	1,044.00	2.94
COALINDIA	389.40	380.10	2.45
INDUSINDBK	767.80	751.20	2.21

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,480.00	1,498.70	-1.25
NESTLEIND	1,192.30	1,200.90	-0.72
HDFCLIFE	777.25	782.75	-0.70
WIPRO	249.54	250.93	-0.55
NTPC	334.50	336.30	-0.54

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,60,83,481	953.95	1,524.17
ETERNAL	4,66,74,039	326.30	1,516.25
ICICIBANK	98,13,382	1,396.60	1,366.26
TATASTEEL	8,23,52,014	167.83	1,362.35
RELIANCE	78,47,563	1,372.00	1,074.21

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	8,23,52,014	167.83	1,362.3
ETERNAL	4,66,74,039	326.30	1,516.2
POWERGRID	3,01,78,885	286.00	866.04
HDFCBANK	1,60,83,481	953.95	1,524.1
ITC	1,29,36,588	411.10	531.11



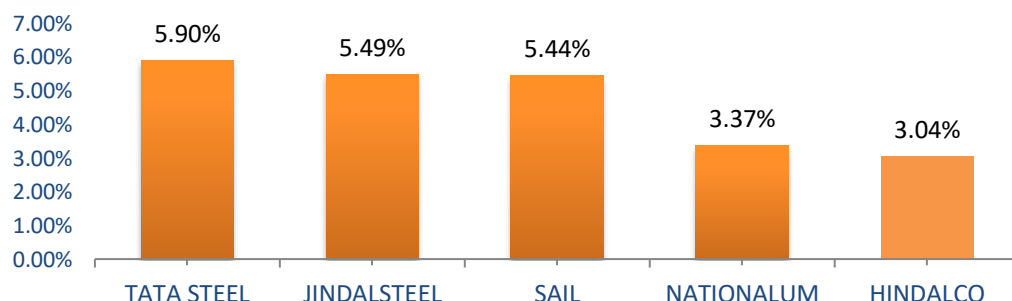
Indian equity benchmarks ended with significant gains on Wednesday, with both Nifty and Sensex closing over half a percent gains, amid positive services PMI data. After making a slightly positive start, soon indices turned volatile as traders stayed cautious as FM Nirmala Sitharaman-chaired GST Council meeting has begun in New Delhi. The GST Council is likely to discuss the revisions of tax slabs. However, in afternoon session, markets gained traction and ended near day's high points. Traders got some support as Indian services sector growth touched a 15-year high in August, driven by a sharp rise in new orders and output, amid substantial improvement in demand conditions. Investors remained optimistic after Commerce and Industry Minister Piyush Goyal expressed hope that India will conclude the proposed BTA with the US by the fall or November this year. Traders took some support with Union FM Nirmala Sitharaman's statement that the next generation GST reforms would 'absolutely' set an economy open and transparent with further reduction in compliance burden and benefiting small businesses.

On Global front, European markets were trading in green after HCOB Eurozone Composite PMI edged up from 50.9 in July to 51.0 in August, marking a 12-month high.
Source: AceEquity

NEWS BULLETIN

- **Netweb Technologies India** has secured a purchase order worth around Rs 1,734 crore (excluding applicable taxes) from Indian-headquartered global providers of technology distribution and integrated supply chain solutions. The purchase order is for the supply of servers based on NVIDIA's cutting-edge Blackwell Architecture. The order is to be executed by first half of FY 2027.
- **E2E Network** has received a letter from IndiaAI Mission. As per the letter, H200 SXM and H100 SXM GPUs has been allocated for a period of 360 days totalling to 1,29,94,560 GPU hours. The total value for this order is around Rs 177 crore.
- **SBC Exports** has received work order from Institute of Company Secretaries of India (ICSI) for providing Manpower supply. Broad consideration or size of the order is Rs 6 crore.

MARKET DRIVING SECTOR : METAL



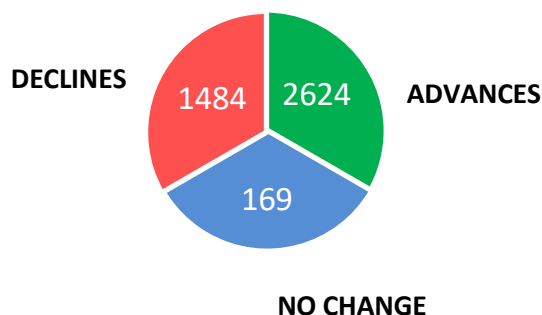
S&P BSE: METAL

CLOSING: 32,138.17

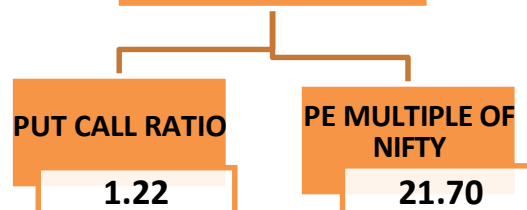
CHANGE: + 961.05

CHANGE: + 3.08%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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