

04th SEP 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,567.71	81,456.67	81,456.67	80,608.94	80,718.01	+ 150.30	+ 0.19
NIFTY	24,715.05	24,980.75	24,980.75	24,708.20	24,734.30	+ 19.25	+ 0.08

INDICES CLOSED ON A FLAT NOTE

The 30-share BSE Sensex was up by 150.30 points or 0.19% to settle at 80,718.01 and the Nifty was up by 19.25 points or 0.08% to settle at 24,734.30. The BSE Mid-Cap was down by 0.60% and BSE Small Cap was down by 0.60%. On the sectoral front, FMCG, Auto, Consumer Durables and Bank were gaining indices; on the flip side, Oil & Gas, Metal, Healthcare, Realty, IT, Capital Goods and Bank were losing indices. Mahindra & Mahindra, Bajaj Finance, Bajaj Finserv, Trent and ITC were the top gainers on the Sensex; on the flip side, Maruti, BEL, HCL Tech, NTPC and Powergrid 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
M&M	3,480.00	3,286.00	5.90
BAJFINANCE	933.05	896.30	4.10
APOLLOHOSP	7,891.00	7,736.00	2.00
BAJAJFINSV	2,003.00	1,966.10	1.88
NESTLEIND	1,211.40	1,194.80	1.39

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HDFCLIFE	754.55	776.45	-2.82
TATACONSUM	1,074.00	1,104.40	-2.75
INDUSINDBK	755.00	768.10	-1.71
MARUTI	14,680.00	14,927.00	-1.65
WIPRO	245.45	249.56	-1.65

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
M&M	76,00,320	3,480.00	2,656.09
BAJFINANCE	2,17,38,706	933.05	2,037.72
RELIANCE	1,32,23,177	1,359.10	1,803.59
HDFCBANK	1,75,97,657	960.95	1,691.72
ICICIBANK	1,05,64,859	1,408.00	1,487.93

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	4,32,85,629	327.55	1,406.4
ITC	2,72,74,123	415.75	1,141.5
TATASTEEL	2,63,16,842	166.70	440.10
BAJFINANCE	2,17,38,706	933.05	2,037.7
HDFCBANK	1,75,97,657	960.95	1,691.7



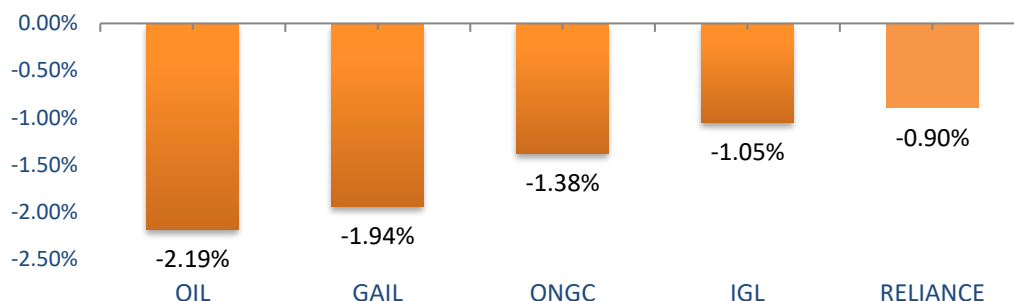
Indian equity benchmarks ended Thursday's session flat with a positive bias, amid the expiry of Sensex F&O contracts. Indices made a gap-up opening, as investors were optimistic following Finance Minister Nirmala Sitharaman's announcement of significant GST rate cuts, set to take effect from September 22, 2025. However, in afternoon session, markets came off from day's high points, but managed to close with modest gains. Traders took support as Commerce and Industry Minister Piyush Goyal has assured exporters to support them in dealing with steep tariffs imposed by the US. He also reaffirmed the government's commitment to safeguarding the interests of Indian exporters amid the evolving global trade scenario. Some support also came as External Affairs Minister S Jaishankar stated that India would like to see its negotiations with the European Union for a free trade agreement move to a decisive conclusion soon.

On Global front, European markets were trading mostly in green, amid expectations the Federal Reserve will announce an interest rate cut after its monetary policy meeting next week. Asian markets ended mixed following reports that China's financial regulators are considering a number of cooling measures for the stock market, including lifting certain short selling restrictions, increasing checks on speculative trades, and discouraging heavy retail participation. Source: AceEquity

NEWS BULLETIN

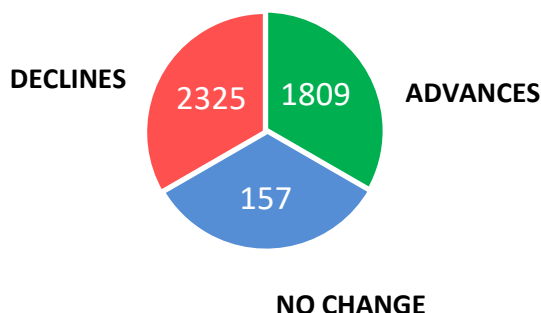
- **Univastu India** has received a work order worth Rs 22.89 crore (including 18% GST) from M/s Super Construction Company. This Project is regarding Design, manufacture, supply, installation excluding civil work of Myrtha pools for the construction of World Aquatics (earlier know as FINA) compliant.
- **Angel One** has reported 26% growth in client base to 33.57 million in August 2025 as against 26.65 million recorded in August 2024. The company's client base rose by 1.5% Month-on-Month (MoM) from 33.06 million clients in July 2025.
- **Advait Energy Transitions** has received order, in normal course of business for Turnkey Contract for supply, installation, testing. Broad consideration or size of the order is Rs 71.70 crore incl. taxes.

MARKET DRIVING SECTOR : OIL & GAS



S&P BSE: OIL & GAS
CLOSING: 25,863.00
CHANGE: - 273.73
CHANGE: - 1.05%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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