END DAY COMMENTARY

24th SEP 2025

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,102.10	81,917.65	82,045.47	81,607.84	81,715.63	-386.47	-0.47
NIFTY	25,169.50	25,108.75	25,149.85	25,027.45	25,056.90	-112.6	-0.45

INDICES SHUT THE DAY IN RED

The 30-share BSE Sensex was down by 386.47 points or 0.47% to settle at 81,715.63 and the Nifty was down by 112.6 points or 0.45% to settle at 25,056.90. The BSE Mid-Cap was down by 0.85% and BSE Small Cap was down by 0.50%. On the sectoral front, FMCG was the gaining index; on the flip side, Realty, Metal, Auto, Banks, Healthcare, Oil & Gas, Capital Goods, IT, and Consumer Durables were the losing indices. Powergrid, Hindustan Unilever, NTPC, Maruti and HCL Tech were the top gainers on the Sensex; Tata Motors, BEL, Ultratech Cement, Tech Mahindra and Mahindra & Mahindra on the flip side, 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.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
POWERGRID	288.60	293.45	1.68
HINDUNILVR	2,522.20	2,556.60	1.36
NTPC	343.00	347.50	1.31
MARUTI	16,097.00	16,254.00	0.98
JSWSTEEL	1,138.40	1,149.00	0.93

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TATAMOTORS	701.35	683.00	-2.16
BEL	404.45	395.70	-2.11
JIOFIN	312.55	306.25	-2.01
ADANIENT	2,676.40	2,624.00	-1.84
WIPRO	249.63	244.88	-1.72

Most Active (by value)

Name	Qty	Pr.	Value CR
AXISBANK	1,28,12,014	1,160.90	1,486.65
HDFCBANK	1,51,17,165	951.00	1,434.92
ICICIBANK	97,35,668	1,383.00	1,345.66
SBIN	1,28,40,160	866.15	1,120.02
BHARTIARTL	52,37,977	1,936.00	1,009.58

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	2,01,68,889	172.70	349.77
HDFCBANK	1,51,17,165	951.00	1,434.9
NTPC	1,46,53,565	347.50	509.48
POWERGRID	1,40,32,178	293.45	409.14
TATAMOTOR	1,32,52,011	683.00	911.82

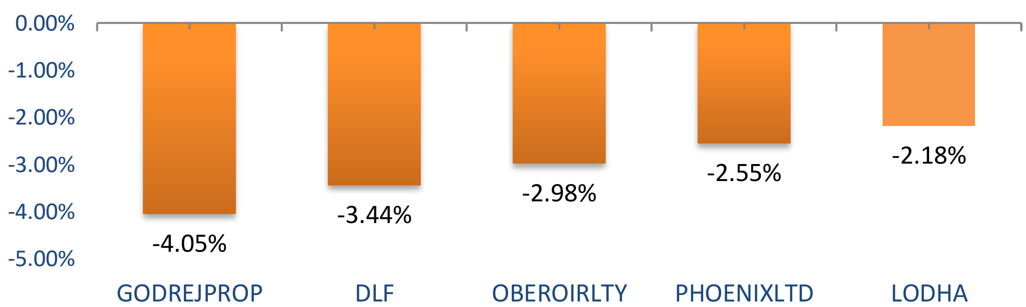
Indian equity benchmarks extended their losing streak for a fourth consecutive session, dragged by selling in IT and Banking stocks. Markets made negative start amid renewed trade tensions and U.S. President Donald Trump blaming China and India during his UN General Assembly address, calling the two nations the primary funders of the Ukraine war. In last leg of trade, indices ended near day's low points. Traders overlooked the Organization for Economic Cooperation and Development's (OECD) report in which it has raised India's Gross Domestic Product (GDP) growth by 40 bps to 6.7 per cent for fiscal year 2025-26 (FY26) from its earlier projection of 6.3 per cent in June -- driven by strong domestic demand and robust GST reforms. Trader took note of Indian delegation led by Neelam Shami Rao, Secretary, Ministry of Textiles, Government of India, is visiting London to showcase India's strength across the textile value chain and to deepen India-UK trade engagement.

On Global front, European markets were trading red, after Federal Reserve Chair Jerome Powell in a speech last night said that equity prices are fairly highly valued by many measures. Source:AceEquity

NEWS BULLETIN

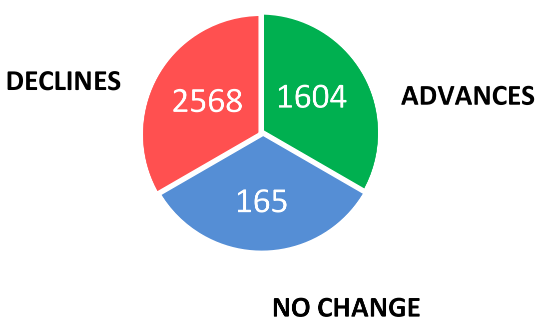
- **Refex Industries'** subsidiary -- Venwind Refex Power (VRPL) has signed a term sheet for supply of Wind Turbine Generators (WTGs) and Tubular Towers for wind power projects, for an aggregate contract value of Rs 474.45 crore, with a leading Independent Power Producer, to be set-up in the State of Gujarat.
- **Desco Infratech** has received new order worth Rs 3.96 crore (inclusive of GST) from Gail Gas for laying of underground MDPE Pipeline and Associated Works for City Gas Distribution (CGD) Projects in Bengaluru. The order is to be executed within 12 months.
- **SEPC** has secured purchase order worth around Rs 75.19 crore from M/s Gefos Solutions for supply of construction materials for four Infrastructure Projects (Residential Buildings). The order is to be executed within 8 to 9 months.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 6,914.64
CHANGE: - 174.84
CHANGE: - 2.47%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

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