



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	83,294.66	83,052.54	83,079.51	81,934.73	82,225.92	-1,068.74	-1.28
NIFTY	25,713.00	25,641.80	25,641.80	25,327.60	25,424.65	-288.35	-1.12

INDICES CLOSED IN DEEP RED

The 30-share BSE Sensex was down by 1,068.74 points or 1.28% to settle at 82,225.92 and the Nifty was down by 288.35 points or 1.12% to settle at 25,424.65. The BSE Small Cap 250 was down by 0.76% and BSE 500 was down by 0.78%. On the sectoral front, FMCG, Healthcare, Capital Goods, Metal and Oil & Gas were gainer indices. On the flip side, Auto, IT, Consumer Durables, Banks and Realty were losing indices. NTPC, Hindustan Unilever, Tata Steel, Powergrid and Titan were top gainers on the Sensex; on the flip side, Tech Mahindra, HCL Tech, Eternal, Infosys and TCS 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
NTPC	384.50	375.45	2.41
COALINDIA	431.45	426.00	1.28
JSWSTEEL	1,256.20	1,240.50	1.27
HINDALCO	925.30	916.20	0.99
HINDUNILVR	2,364.80	2,345.40	0.83

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
TECHM	1,352.00	1,440.90	-6.17
HCLTECH	1,343.00	1,426.20	-5.83
ETERNAL	254.40	268.00	-5.07
INFY	1,280.20	1,327.50	-3.56
TCS	2,581.00	2,676.30	-3.56

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
INFY	2,78,39,061	1,280.20	3,556.97
HDFCBANK	3,13,13,985	911.50	2,866.23
ICICIBANK	1,82,74,784	1,385.50	2,537.45
TCS	77,98,833	2,581.00	2,017.55
ETERNAL	7,68,36,880	254.40	1,967.18

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ETERNAL	7,68,36,880	254.40	1,967.1
HDFCBANK	3,13,13,985	911.50	2,866.2
INFY	2,78,39,061	1,280.20	3,556.9
WIPRO	2,50,36,686	200.49	502.54
TATASTEEL	2,34,13,086	209.00	488.35



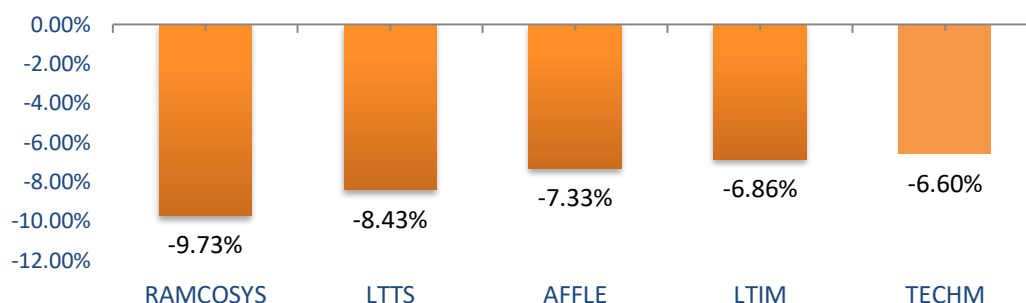
Indian equity benchmarks plunged sharply lower on Tuesday, weighed down by heavy selling in IT stocks amid rising global concerns over AI-related disruptions. Markets made a gap-down opening and remained under pressure throughout the session as traders were cautious following U.S. President Donald Trump’s statement that any countries that want to play games after the court's tariff ruling would be hit with a much higher tariff. Sentiments remained downbeat as the government halved the rate of duty benefits under the export support scheme, the Remission of Duties and Taxes on Exported Products (RoDTEP), prompting the exporting community to seek a reconsideration of the decision. Traders overlooked Reserve Bank of India Governor Sanjay Malhotra’s statement that the new CPI inflation series based on 2024 prices will better reflect Indian households' consumption patterns and reduce volatility. India and France have amended the double taxation avoidance agreement which will provide full taxing rights in respect of capital gains to the nation where such company is a resident and delete the MFN Clause bringing in certainty in taxation.

On the global front, European equity markets were trading mostly in red as investors stayed cautious over Iran tensions, tariff worries and growth concerns. Investors now await U.S. President Donald Trump's State of the Union speech to Congress for direction. Source: Ace Equity

NEWS BULLETIN

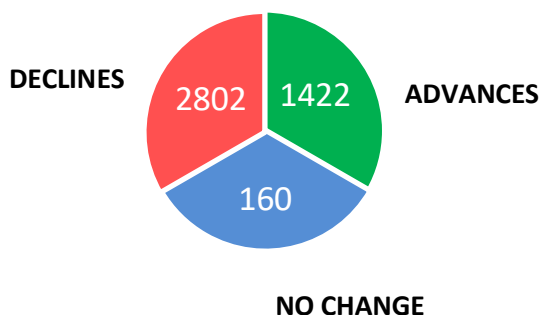
- **KEC International** has secured new orders of Rs 1,002 crore across various businesses. Its Transmission & Distribution (T&D) business has secured orders for T&D projects for 220/132 kV Transmission lines, Substations and EHV Cabling (Composite order) in India.
- **Pace Digitek’s** material subsidiary -- M/s Lineage Power has received a purchase order worth Rs 158.71 crore (Including GST) from Reliance Industries for the supply of Battery Packs of Li-ion 48V 15S1P 314 AH. The order delivery is to be completed by August 31, 2026. Pace Digitek is a telecom infrastructure solution provider with a significant focus on the telecom infrastructure industry including telecom towers and optical fibre cables.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: - 29,241.63
CHANGE: - 1,386.21
CHANGE: - 4.53%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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