



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	81,287.19	78,543.73	80,632.55	78,543.73	80,238.85	-1,048.34	-1.29
NIFTY	25,178.65	24,659.25	24,989.35	24,603.50	24,865.70	-312.95	-1.24

BOURSES CLOSED IN DEEP RED

The 30-share BSE Sensex was down by 1,048.34 points or 1.29% to settle at 80,238.85 and the Nifty was down by 312.95 points or 1.24% to settle at 24,865.70. The BSE Small Cap 250 was down by 1.98% and BSE 500 was down by 1.41%. On the sectoral front, Metal were gainer index. On the flip side, Consumer Durables, Realty, IT, Healthcare, Auto, Banks, Capital Goods, Oil & Gas and FMCG were losing indices. BEL, Sunpharma and ITC were top gainers on the Sensex; on the flip side, Indigo, Larsen & Toubro, Adani Ports, Maruti and Asian Paint 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
BEL	454.15	444.70	2.13
HINDALCO	940.45	924.70	1.70
SUNPHARMA	1,753.20	1,737.00	0.93
ONGC	281.45	279.70	0.63
ITC	314.70	313.60	0.35

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
INDIGO	4,533.00	4,827.20	-6.09
LT	4,054.00	4,278.30	-5.24
ADANI PORTS	1,468.90	1,521.00	-3.43
MARUTI	14,368.00	14,857.00	-3.29
ASIANPAINT	2,303.00	2,376.20	-3.08

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	3,83,78,924	882.10	3,374.97
RELIANCE	2,37,28,722	1,360.00	3,222.81
LT	65,42,141	4,054.00	2,652.07
ICICIBANK	1,69,28,683	1,374.80	2,318.54
BHARTIARTL	1,17,85,758	1,872.00	2,210.67

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ETERNAL	7,33,88,956	242.30	1,768.5
ONGC	6,58,43,426	281.45	1,861.9
HDFCBANK	3,83,78,924	882.10	3,374.9
BEL	3,50,34,174	454.15	1,583.3
TATASTEEL	3,05,23,310	210.87	643.10



The key equity benchmarks ended sharply lower on Monday, as investors turned cautious amid weak global cues. Market sentiment was weighed down by escalating geopolitical tensions following the US-Israel attacks on Iran, keeping risk appetite subdued. Traders remained focused on crude oil and metal price movements for further cues. The seasonally adjusted HSBC India Manufacturing Purchasing Managers' Index (PMI)—a gauge of overall conditions derived from measures of new orders, output, employment, supplier delivery times, and stocks of purchases—rose from 55.4 in January to a four-month high of 56.9 in February. Goods producers indicated that demand buoyancy, marketing initiatives, and rising client requirements underpinned another expansion in new business intakes. Moreover, the pace of growth was historically elevated and the strongest since last October.

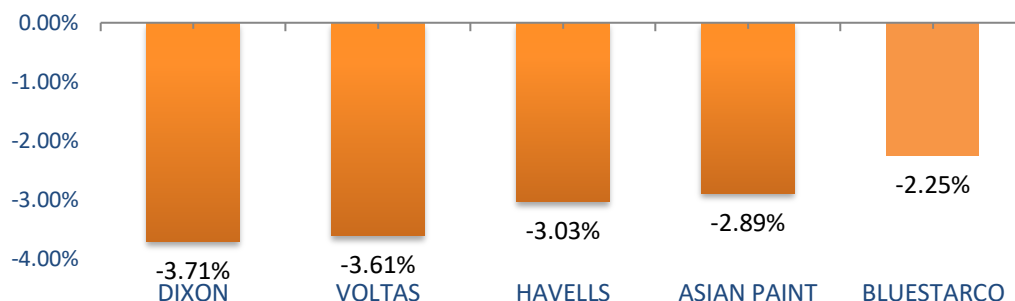
On the global front, European shares declined on Monday. Asian markets ended lower after the United States and Israel launched their most ambitious attacks on Iran in decades, killing Supreme Leader Ayatollah Ali Khamenei.

Source: Ace Equity

NEWS BULLETIN

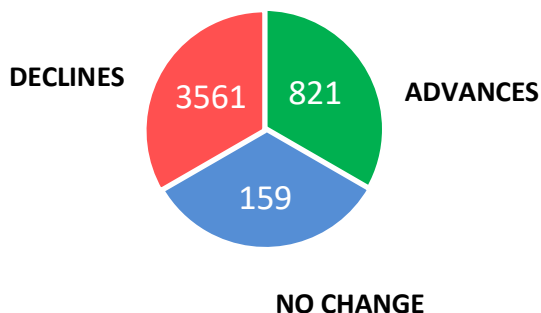
- **Oswal Pumps'** wholly owned subsidiary-- Oswal Solar Energy has secured an order from Swashakthi Energy for the supply, installation, and commissioning of 7.46 MWp rooftop solar systems. The order, valued at Rs 39.40 crore (inclusive of GST), positions the company to enter the rooftop solar segment, creating a strategic pathway for participation under the Government of India's flagship initiative, PM Surya Ghar: Muft Bijli Yojana.
- **Bondada Engineering** has commissioned solar power projects aggregating to 61.7 MWp during March 2026. These projects were executed for esteemed clients including Paradigm IT and MAHAGENCO, across multiple locations in the state of Maharashtra.

MARKET DRIVING SECTOR : CONSUMER DURABLES

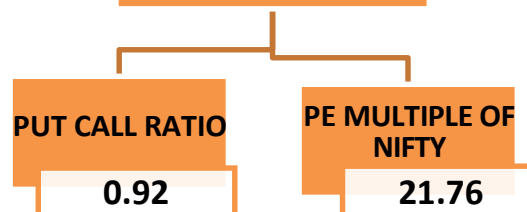


S&P BSE: CONSUMER DURABLES
CLOSING: 57,834.34
CHANGE: - 1,359.10
CHANGE: - 2.30%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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