



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,863.71	76,369.65	76,681.71	75,871.18	76,034.42	-829.29	-1.08
NIFTY	23,866.85	23,674.85	23,833.15	23,556.30	23,639.15	-227.70	-0.95

INDICES EXTENDED LOSSES

The 30-share BSE Sensex was down by 829.29 points or 1.08% to settle at 76,034.42 and the Nifty was down by 227.70 points or 0.95% to settle at 23,639.15. The BSE Small Cap 250 was down by 0.32% and BSE 500 was down by 0.66%. On the sectoral front, Capital Goods, Metal and Oil & Gas were gainer indices. On the flip side, Auto, Consumer Durables, Healthcare, Realty, Banks, FMCG and IT were losing indices. NTPC, Powergrid, Tech Mahindra, HCL Tech and Reliance were top gainers on the Sensex; on the flip side, Mahindra & Mahindra, Maruti, Bajaj Finance, Larsen & Toubro and Ultratech Cement 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
COALINDIA	470.00	446.75	5.20
NTPC	390.95	379.90	2.91
POWERGRID	304.00	298.80	1.74
TECHM	1,354.30	1,334.40	1.49
JIOFIN	242.00	238.70	1.38

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
M&M	3,029.10	3,168.20	-4.39
EICHERMOT	6,969.50	7,253.50	-3.92
MARUTI	12,995.00	13,497.00	-3.72
BAJFINANCE	862.95	893.65	-3.44
TMPV	324.30	335.35	-3.30

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,61,07,561	833.30	3,835.46
RELIANCE	2,09,39,959	1,390.00	2,926.48
ICICIBANK	1,96,76,187	1,269.90	2,499.94
BHARTIARTL	1,29,22,735	1,798.30	2,328.59
M&M	69,68,585	3,029.10	2,129.98

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ETERNAL	6,57,32,459	220.90	1,438.1
HDFCBANK	4,61,07,561	833.30	3,835.4
COALINDIA	2,73,28,045	470.00	1,270.4
KOTAKBANK	2,50,48,123	375.00	944.11
TATASTEEL	2,44,13,736	193.50	469.89



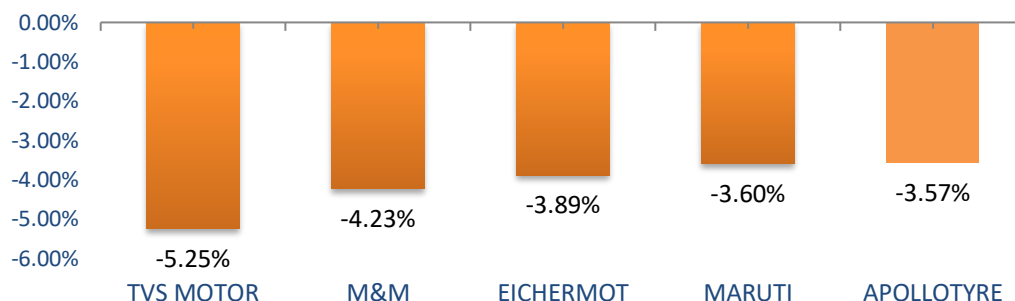
Indian equity benchmarks ended lower on Thursday ahead of the release of India's Consumer Price Index (CPI) data later in the day. Markets made a gap-down opening as crude oil prices surged, with Brent crude climbing above the crucial \$100 per barrel mark, alongside renewed global trade tensions. In the afternoon session, indices trimmed some losses as traders drew support from private reports indicating that Iran would allow Indian oil tankers passage through the Strait of Hormuz. However, the recovery proved to be short lived and markets extended their losses in dying hours of the trade amid persistent concerns over the escalating crisis in West Asia. Some support came after a private report said that Iran has allowed Indian oil tankers to pass through the Strait of Hormuz following talks between External Affairs Minister S Jaishankar and his Iranian counterpart Abbas Araghchi. Traders took a note of Crisil Intelligence's report stated that real GDP growth of India is likely to moderate but remain healthy at 7.1% in fiscal year 2026-27 (FY27) compared with 7.6% in FY26 (revised under the new GDP series).

On the global front, European equity markets traded in the red, while Asian markets ended mostly lower, as Brent crude oil, the international benchmark, briefly surpassed \$100 per barrel amid supply concerns from Iranian attacks on commercial shipping near the Strait of Hormuz.
Source: Ace Equity

NEWS BULLETIN

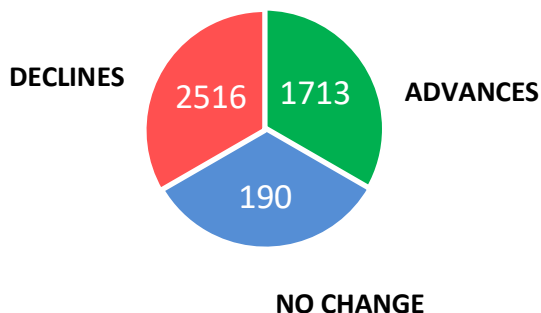
- **Omnitech Engineering** has secured a contract through Master Purchase Agreement from Weatherford Products GmbH. The contract has a tenure of 5 years. The company will receive a consideration of around \$20.10 million (Rs 184 crore) plus GST per year. The total value of contract is around Rs 920 crore plus GST.
- **Vascon Engineers** has secured a work order worth around Rs 115.90 crore from Ahmedabad Municipal Corporation, Sardar Patel Bhavan, Municipal Corporation, Danapith, Ahmedabad.
- **KEC International** has secured new orders of Rs 1,476 crore for Transmission & Distribution projects in India, the Middle East, Africa and the Americas. The company has received orders for 380 kV Transmission lines, Substations and EHV Cabling (Composite order) in Saudi Arabia.

MARKET DRIVING SECTOR : AUTO

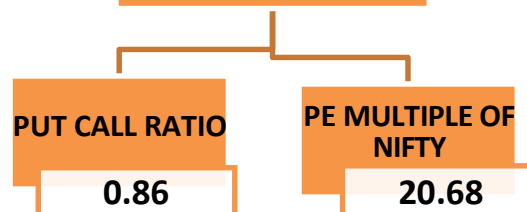


S&P BSE: AUTO
CLOSING: 55,697.60
CHANGE: - 1,676.57
CHANGE: - 2.92%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



[For Disclosure & Disclaimer, click here](#)