

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,704.13	74,750.92	75,354.18	73,950.95	74,207.24	-2,496.89	-3.26
NIFTY	23,777.80	23,197.75	23,378.70	22,930.35	23,002.15	-775.65	-3.26

BLOOD BATH IN D-STREET AMID HEAVY SELLING

The 30-share BSE Sensex was down by 2,496.89 points or 3.26% to settle at 74,207.24 and the Nifty was down by 775.65 points or 3.26% to settle at 23,002.15. The BSE Small Cap 250 was down by 2.58% and BSE 500 was down by 3.13%. On the sectoral front, there were no gainer indices. On the flip side, Auto, IT, Metal, Banks, Oil & Gas, FMCG, Capital Goods, Healthcare, Realty and Consumer Durables were losing indices. There were no gainers on the Sensex; on the flip side, Eternal, Bajaj Finance, Mahindra & Mahindra, HDFC Bank and Larsen & Toubro 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
ONGC	269.1	265	1.55

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
SHRIRAMFIN	953.00	1,021.60	-6.71
ETERNAL	229.50	242.54	-5.38
HDFCBANK	800.00	843.05	-5.11
BAJFINANCE	836.70	880.10	-4.93
M&M	3,059.80	3,214.60	-4.82

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	17,16,37,393	800.00	13,761.3
RELIANCE	1,64,98,373	1,392.00	2,301.06
ICICIBANK	1,44,22,899	1,259.70	1,815.66
LT	48,98,518	3,444.00	1,693.51
ETERNAL	7,23,05,788	229.50	1,674.60

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	17,16,37,393	800.00	13761.3
ETERNAL	7,23,05,788	229.5	1674.60
ONGC	2,86,85,305	269.10	770.52
TATASTEEL	2,41,46,344	191.20	463.92
ITC	1,78,51,126	299.10	535.12



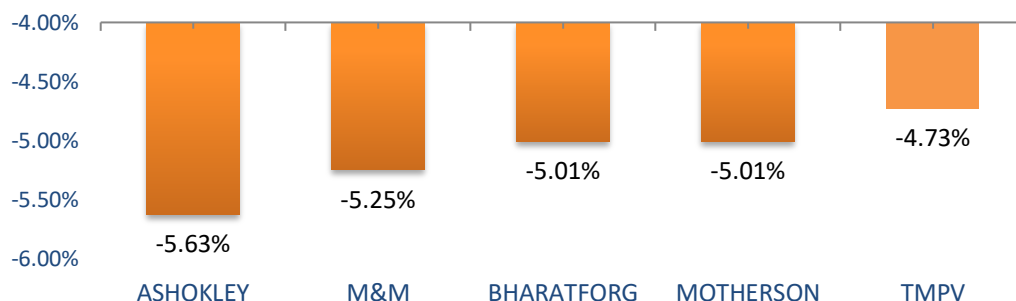
Indian equity benchmarks witnessed a brutal bloodbath on Thursday, with both the Nifty and Sensex crashing over 3%, amid rising crude oil prices and escalating geopolitical tensions after Iran struck Middle East energy facilities in retaliation for an Israeli attack on the South Pars gas field. Markets made a gap-down opening and remained under intense selling pressure throughout the session, with broad-based sell-off across the sectors. Investor sentiments were further dampened by continued foreign fund outflows, as FIIs offloaded equities worth Rs 2,714.35 crore on Wednesday, marking their 14th consecutive day of selling. Cautiousness came as a report by ICRA and ASSOCHAM said fresh slippages in the banking sector are expected to rise in the near term due to emerging stress in the retail and MSME segments, even as overall asset quality remains strong. Traders remained cautious as data from the RBI showed India's outward FDI declined to \$2.76 billion in February 2026 from \$4.30 billion in the same month last year. Traders overlooked report that the Income Tax Department data showed net direct tax collection grew 7.1% to about Rs 22.8 lakh crore till March 17 in this fiscal (FY26), driven by slower refunds and higher corporate tax collections.

On the global front, European equity markets traded in the red following attacks by Iran on energy facilities in the Middle East, including the crucial South Pars gas field.
Source: Ace Equity

NEWS BULLETIN

- **Railtel Corporation of India** has secured orders worth around Rs 217.13 crore (Including Tax) in Bihar. The company has secured a work order worth around Rs 168.75 crore (Including Tax) from State Project Director (Spd) Bihar Education Project Council (Bepc). The order pertains to implementation of Education Quality Enhancement initiatives in selected government school across Bihar under PM SHRI and to be executed by the September 30, 2026.
- **Hindustan Construction Company (HCC)** has secured a infrastructure contract valued at around Rs 1,662.27 crore from the Brihanmumbai Municipal Corporation (BMC) for the construction of Goregaon-Mulund Link Road (GMLR) Phase IV. The project has been awarded to the Aakshya-HCC joint venture (JV), in which HCC holds a 49% stake.

MARKET DRIVING SECTOR : AUTO



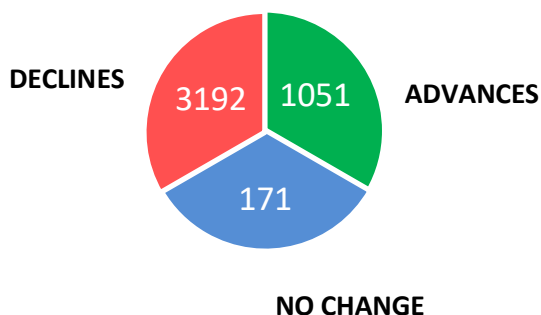
S&P BSE: AUTO

CLOSING: 54,333.43

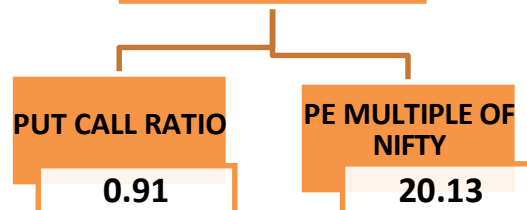
CHANGE: - 2,305.89

CHANGE: - 4.07 %

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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