

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,532.96	73,732.58	73,732.58	72,558.44	72,696.39	-1,836.57	-2.46
NIFTY	23,114.50	22,824.35	22,851.70	22,471.25	22,512.65	-601.85	-2.60

INDICES CLOSED IN RED AMID GEO POLITICAL TENSION

The 30-share BSE Sensex was down by 1,836.57 points or 2.46% to settle at 72,696.39 and the Nifty was down by 601.85 points or 2.60% to settle at 22,512.65. The BSE Small Cap 250 was down by 3.86% and BSE 500 was down by 3.13%. On the sectoral front there were no gainer index. On the flip side, Consumer Durables, IT, Auto, Metal, Banks, Oil & Gas, FMCG, Capital Goods, Healthcare and Realty were losing indices. HCL Tech, Powergrid, Infosys and Tech Mahindra were gainers on the Sensex; on the flip side, Titan, Trent, Ultratech Cement, BEL and Indigo 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
HCLTECH	1,357.10	1,333.70	1.75
POWERGRID	300.00	297.60	0.81
TECHM	1,389.00	1,384.80	0.30

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
TITAN	3,842.60	4,106.60	-6.43
SHRIRAMFIN	880.80	938.60	-6.16
TRENT	3,347.00	3,559.60	-5.97
JIOFIN	225.90	239.30	-5.60
HDFCLIFE	590.10	623.65	-5.38

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	7,23,41,738	742.30	5,442.70
RELIANCE	1,89,79,554	1,404.00	2,665.58
ICICIBANK	1,70,49,534	1,225.00	2,089.16
LT	56,45,839	3,341.90	1,878.46
SBIN	1,60,39,603	1,030.10	1,653.68

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	7,23,41,738	742.30	5,442.7
ETERNAL	7,11,21,843	226.86	1,614.6
TATASTEEL	4,43,93,392	187.00	835.08
ITC	3,17,88,160	290.95	928.18
ONGC	2,39,91,581	265.40	640.14



The key equity indices ended sharply lower on Monday as escalating tensions between the US and Iran, along with a weakening rupee and rising crude oil prices, rattled investor sentiment. RBI in its March bulletin noted that the conflict in Middle East and fresh trade investigations by the US have resulted in increased volatility in the global markets. The second advance estimates of GDP for 2025–26 indicate sustained resilience of the Indian economy. High frequency indicators signal towards economic activity gaining momentum in February. Investor sentiment also remained cautious amid a weakening rupee and a spike in market volatility, with the volatility index surging over 17%. Participants largely maintained a risk-off stance, prioritizing capital protection.

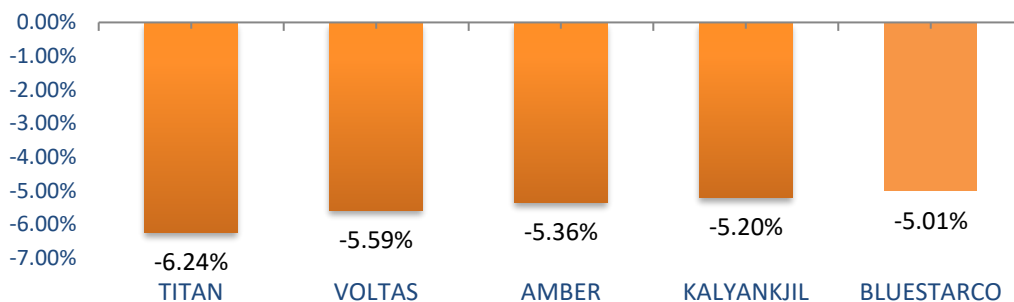
On the global front, The US Dow Jones index futures are currently down by 331 points, signalling a negative opening for US stocks today. European shares declined while Asian markets ended lower on Monday, as investors fled risk assets amid escalating conflict in the Middle East that has entered its fourth week. President Donald Trump said on Saturday that he would obliterate Iran’s power plants if Tehran failed to fully reopen the Strait of Hormuz—a vital artery for global energy flows—within 48 hours.

Source: Capitalmarket

NEWS BULLETIN

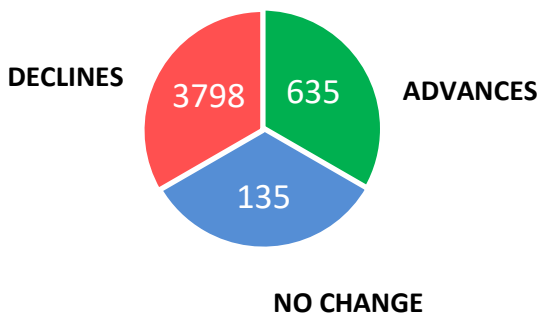
- **Larsen & Toubro:** Co plans possible collaboration with Chinese companies under New FDI Rules, Focused on competitive pricing and cost savings for future partnership, Press note 3 aims at Solar, Capital goods and electronics sectors.
- **Wipro** Company expands its strategy in South Korea by opening an innovation lab in Seoul.
- **Bharti Airtel Company** expands 5G coverage with over 2750 new sites in Gujarat, improving service for more than 41 Million customers, launches Rs. 399 recharge for unlimited data.
- **MAX Healthcare;** HSBC on healthcare Institute upgraded target price Rs. 1125 as strong growth visibility driven by 43% capacity addition, scale benefits, ramp up Noida hospitals.

MARKET DRIVING SECTOR : CONSUMER DURABLES

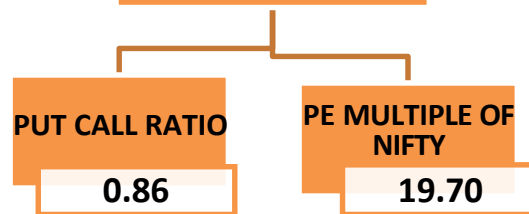


S&P BSE: CONSUMER DURABLES
CLOSING: 52,061.30
CHANGE: - 2,690.06
CHANGE: - 4.91%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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