



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,106.85	73,734.36	74,686.32	73,282.41	74,616.58	+509.73	+0.69
NIFTY	22,968.25	22,838.70	23,153.85	22,719.30	23,123.65	+155.40	+0.68

INDICES SHUT THE DAY IN POSITIVE NOTE

The 30-share BSE Sensex was up by 509.73 points or 0.69% to settle at 74,616.58 and the Nifty was up by 155.40 points or 0.68% to settle at 23,123.65. The BSE Small Cap 250 was up by 0.16% and BSE 500 was up by 0.50%. On the sectoral front, IT, Oil & Gas, Auto, Capital Goods, Metal, Banks, FMCG, Healthcare and Realty gaining indices. On the flip side, Consumer Durables were losing index. HCL Tech, TCS, Infosys, Bharti Airtel and Sunpharma were gainers on the Sensex; on the flip side, Indigo, Adani Ports, Mahindra & Mahindra, Titan and Trent 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
WIPRO	204.60	197.29	3.71
HINDALCO	955.00	927.45	2.97
TCS	2,543.50	2,473.90	2.81
HCLTECH	1,440.50	1,403.30	2.65
INFY	1,340.00	1,306.20	2.59

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
DRREDDY	1,198.00	1,217.80	-1.63
INDIGO	4,269.00	4,312.50	-1.01
ADANIANT	1,884.00	1,902.20	-0.96
APOLLOHOSP	7,329.00	7,373.00	-0.60
TRENT	3,815.00	3,833.60	-0.49

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	5,13,09,793	772.40	3,941.46
RELIANCE	2,83,88,922	1,307.30	3,686.95
ICICIBANK	2,56,00,557	1,248.50	3,161.69
INFY	1,53,55,792	1,340.00	2,042.00
BHARTIARTL	1,00,57,628	1,831.00	1,827.28

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	5,13,09,793	772.40	3,941.4
ETERNAL	4,03,64,387	231.80	930.96
TATASTEEL	3,20,90,982	197.90	630.43
RELIANCE	2,83,88,922	1,307.30	3,686.9
ITC	2,69,63,485	298.65	801.06



Indian equity benchmarks recovered from early losses and ended near the day's highs ahead of the RBI's rate decision scheduled for Wednesday. Markets made a gap-down opening, amid growing uncertainty over a US deadline for Iran to reopen the Strait of Hormuz. However, sentiments improved as the session progressed, with indices erasing all losses and closing with strong gains, supported by buying in IT and metal stocks. Traders found some support with Finance Minister Nirmala Sitharaman's statement that strong fiscal discipline has given India enough flexibility to increase capital expenditure, support sectors affected by the West Asia crisis, and allow the RBI to consider further rate cuts. Traders took note of the Reserve Bank's statement that the investment limit for foreign portfolio investors in government securities through the general route will remain unchanged at 6 per cent of the outstanding stocks of securities for 2026-27. Some support came as CareEdge Ratings' report stated that India's economic growth is expected to remain resilient in the face of rising global uncertainties, with GDP projected to expand at 6.7 per cent in FY27.

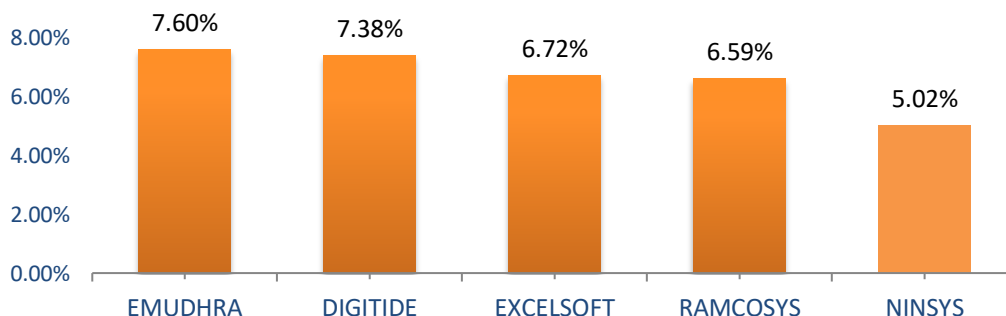
On the global front, European markets were trading in green as traders picked up stocks despite lingering concerns about the conflict in the Middle East.

Source: AceEquity

NEWS BULLETIN

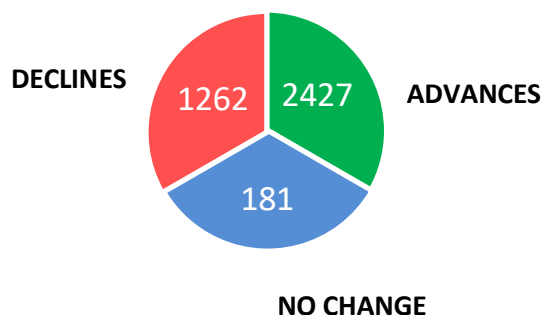
- **Refex Industries** has bagged an order worth around Rs 70.2 crore from a leading Navratna PSU in the steel sector. The order is for the supply of Bulk Industrial Commodity. The order is expected to be completed within 2 months.
- **Tech Mahindra** has entered into strategic alliance with Papaya Global, an enterprise platform for managing and paying the global workforce. The partnership is designed to help organizations modernize global workforce operations and enable compliant, scalable payments across employee and contingent workforce models.
- **Dynacons Systems & Solutions** has secured Enterprise Resource Planning (ERP) implementation project from J&Kashmir Bank. The project is valued at around Rs 25 crore and has a contract period of five years.

MARKET DRIVING SECTOR : IT

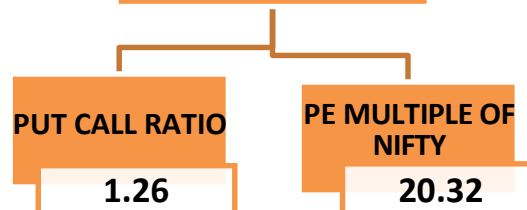


S&P BSE: IT
CLOSING: 30,158.03
CHANGE: + 697.98
CHANGE: + 2.37%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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