



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	79,273.33	79,019.34	79,031.03	78,442.30	78,516.49	-756.84	-0.95
NIFTY	24,576.60	24,470.85	24,515.95	24,352.90	24,378.10	-198.50	-0.81

INDICES ENDED IN RED LED BY SHARP DECLINE IN IT STOCKS

The 30-share BSE Sensex was down by 756.84 points or 0.95% to settle at 78,516.49 and the Nifty was down by 198.50 points or 0.81% to settle at 24,378.10. The BSE Small Cap 250 was up by 0.90% and BSE 500 was down by 0.23%. On the sectoral front, Realty, FMCG, Metal, Healthcare, Oil & Gas, Capital Goods and Consumer Durables were gaining indices. On the flip side, IT, Auto and Bank were the losing indices. Hindustan Unilever, NTPC, Eternal, Ultra Cement and Trent were gainers on the Sensex; on the flip side, HCL Tech, Infosys, Mahindra & Mahindra, TCS and Tech Mahindra were the top losers on the Sensex. On global front, Asian markets shut the day on a mixed note and European indices are trading on a negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
TATACONSUM	1,180.0	1,142.0	3.33
HINDUNILVR	2,366.0	2,310.7	2.39
NTPC	405.15	396.20	2.26
TMPV	362.10	355.90	1.74
HINDALCO	1,038.5	1,021.6	1.65

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
HCLTECH	1,286.4	1,441.2	-10.74
INFY	1,268.8	1,313.2	-3.38
M&M	3,150.0	3,247.3	-3.00
TCS	2,535.3	2,610.5	-2.88
TECHM	1,463.3	1,500.8	-2.50

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,91,35,752	812.00	3,974.8
RELIANCE	2,72,93,629	1,354.9	3,702.6
ICICIBANK	2,33,12,455	1,385.6	3,223.2
BHARTIARTL	1,04,85,373	1,858.7	1,949.6
SBIN	1,69,63,734	1,111.7	1,884.8

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ETERNAL	4,57,17,764	262.25	1,195.2
JIOFIN	4,02,51,825	238.44	959.64
HCLTECH	3,30,66,256	1,286.40	4,313.2
ITC	2,45,00,511	305.50	750.67
HDFCBANK	2,38,76,412	799.40	1,919.9



Indian equity benchmarks snapped their three-day winning streak, with both the Nifty and Sensex closing near the day's low points, weighed down by sell-off in the IT sector stocks. Markets made a negative start and remained under pressure throughout the session, as traders stayed cautious amid rising geopolitical tensions following a lack of progress in US-Iran talks and continued uncertainty surrounding the outcome of the next round of negotiations.

India's fiscal deficit may rise to 4.5% of GDP: Traders remained concerned after research firm BMI, part of Fitch Solutions, said India's fiscal deficit is likely to breach the budgeted target for current fiscal and hit 4.5% of GDP as the government's policy response to the West Asia conflict could strain public finances.

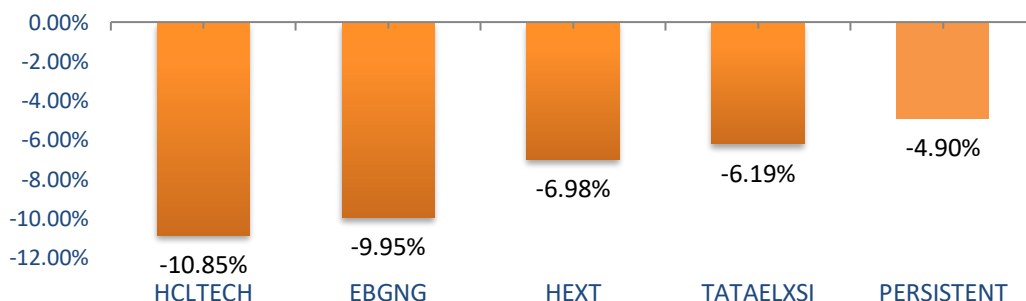
On the global front: European markets were trading mostly in red after U.S. President Donald Trump announced a unilateral extension of the ceasefire amid renewed conflict in the Strait of Hormuz. Asian markets ended mixed due to lingering uncertainty surrounding U.S.-Iran peace talks.

Source: AceEquity

NEWS BULLETIN

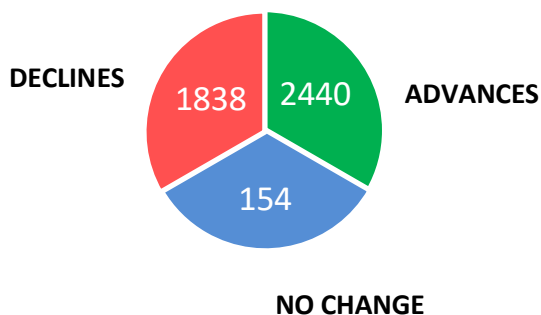
- **HCL Technologies (HCLTech)** has launched dedicated Gemini Enterprise Business Unit. The new business unit, the first of its kind from a global system integrator, will accelerate the development and adoption of industry-specific solutions built on Google Gemini Enterprise.
- **HDB Financial Services** has raised Rs 300 crore through the allotment of 30,000 Secured Redeemable Non-Convertible Debentures (NCDs) of face value of Rs 1,00,000 each on private placement basis. The NCDs have a tenure of 1108 days and carry coupon rate of 7.75% per annum.
- **360 ONE WAM** has reported near fourfold jump in its net profit at Rs 248.46 crore for the quarter under review as compared to Rs 70.41 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : IT

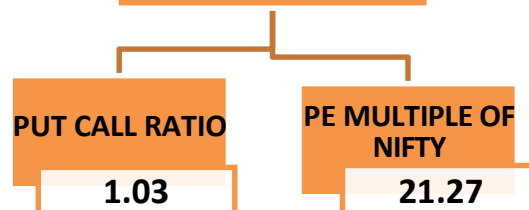


S&P BSE: IT
CLOSING: 29,511.62
CHANGE: -1,122.54
CHANGE: -3.66%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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