



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,269.40	77,103.72	77,151.33	76,515.03	77,017.79	-251.61	-0.33
NIFTY	24,119.30	24,052.60	24,081.70	23,882.05	24,032.80	-86.50	-0.36

INDICES IN RED AMID RISING GEO POLITICAL TENSIONS

The 30-share BSE Sensex was down by 251.61 points or 0.33% to settle at 77,017.79 and the Nifty was down by 86.50 points or 0.36% to settle at 24,032.80. The BSE Small Cap 250 was up by 0.20% and BSE 500 was down by 0.09%. On the sectoral front, Healthcare, IT, Auto, FMCG and Capital Goods were gaining indices. On the flip side, Realty, Metal, Banks, Consumer Durables, and Oil & Gas were losing indices. Mahindra & Mahindra, Ultratech Cement, Bajaj Finserv, Bajaj Finance and Infosys were gainers on the Sensex; on the flip side, ICICI Bank, Eternal, Tech Mahindra, Axis Bank and Bharti Airtel 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
M&M	3,220.8	3,106.5	3.68
ULTRACEMCO	11,939	11,758	1.54
HINDALCO	1,057.0	1,042.7	1.37
BAJAJFINSV	1,791.0	1,770.4	1.16
HDFCLIFE	595.00	588.35	1.13

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ICICIBANK	1,250.9	1,270.8	-1.57
JIOFIN	249.00	252.74	-1.48
COALINDIA	472.85	479.95	-1.48
TECHM	1,451.2	1,471.6	-1.39
AXISBANK	1,257.8	1,275.1	-1.36

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
RELIANCE	2,35,43,341	1,462.5	3,440.74
ICICIBANK	2,44,47,935	1,250.9	3,061.17
HDFCBANK	3,88,87,657	773.20	2,999.40
BHARTIARTL	1,14,07,461	1,816.0	2,070.61
M&M	64,54,419	3,220.8	2,032.17

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	3,88,87,657	773.20	2,999.4
ETERNAL	2,84,98,223	249.10	708.47
ITC	2,67,95,704	310.35	834.63
ICICIBANK	2,44,47,935	1,250.9	3,061.1
RELIANCE	2,35,43,341	1,462.5	3,440.7



Indian equity benchmarks ended in red on Tuesday, weighed down by subdued global cues. Markets made a negative start and remained subdued throughout the session, amid rising geopolitical tensions in the Middle East following Iran's missile and drone attacks on the UAE. Traders were cautious as think tank GTRI said that the Indo-Pacific Economic Framework for Prosperity (IPEF), a 14-member grouping including India, the US and Australia, is losing relevance under US President Donald Trump's aggressive trade strategy. Traders took a note of the data released by the Central Board of Direct Taxes (CBDT) showed that government's net direct tax collections (including corporate and non-corporate tax) for the fiscal year 2025-26 (FY26) increased by 5.12% to over Rs 23.40 lakh crore as compared to Rs 22.26 lakh crore collected in FY25. However, this figure fell short of the revised budget target set for the fiscal year that ended March 2026.

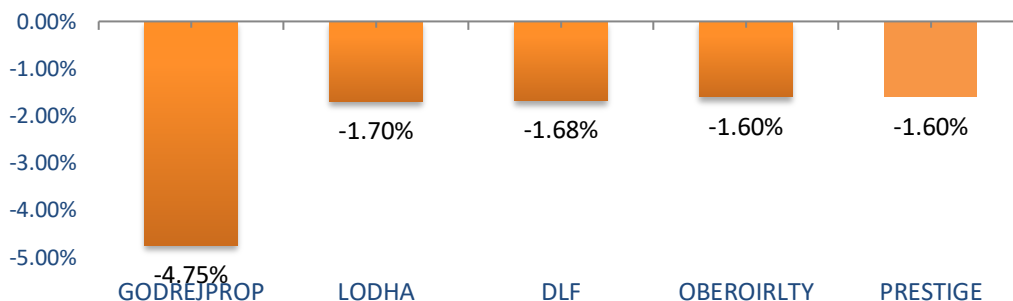
On the global front, European markets were trading mostly in green, as euro zone investor sentiment improved unexpectedly in May, driven by investor expectations that the conflict with Iran would not escalate further.

Source: AceEquity

NEWS BULLETIN

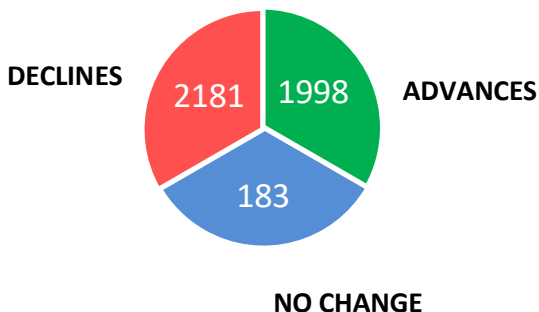
- **Mahindra & Mahindra** has reported 53.35% rise in its net profit at Rs 3,737.27 crore for the fourth quarter ended March 31, 2026 as compared to Rs 2,437.14 crore for the same quarter in the previous year.
- **Nanta Tech** has received a significant order from Pointers Insurance Brokers for the supply of end-to-end AI Automation Solutions. The approximate order value is Rs 6.60 crore. This order is in line with the Company's growth strategy of deepening its presence in the BFSI sector through cutting-edge Artificial Intelligence and automation capabilities. The said order is to be executed in 6 months.
- **Aarti Industries** has reported 48.48% jump in its net profit at Rs 147.00 crore for the fourth quarter ended March 31, 2026 as compared to Rs 99.00 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : REALTY

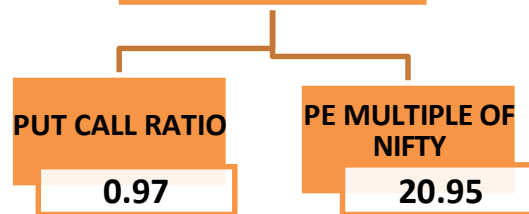


S&P BSE: REALTY
CLOSING: 6,194.72
CHANGE: - 86.60
CHANGE: - 1.38%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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