

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	75,318.39	75,732.42	75,945.79	74,996.78	75,183.36	-135.03	-0.18
NIFTY	23,659.00	23,830.05	23,859.90	23,596.60	23,654.70	-04.30	-0.02

INDICES ERASED MORNING GAINS AND CLOSED ON A FLAT NOTE

The 30-share BSE Sensex was down by 135.03 points or 0.18% to settle at 75,183.36 and the Nifty was down by 04.30 points or 0.02% to settle at 23,654.70. The BSE Small Cap 250 was up by 0.70% and BSE 500 was up by 0.12%. On the sectoral front, Capital Goods, Consumer Durables, Metal, Realty, Healthcare, Oil & Gas and Auto were gaining indices. On the flip side, Banks, IT, and FMCG were losing indices. Indigo, BEL, Trent, Adani Ports and Ultratech Cement were gainers on the Sensex; on the flip side, Bajaj Finance, Tech Mahindra, Hindustan Unilever, Infosys and Bajaj Finserv 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 negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
GRASIM	3,162.0	2,971.1	6.43
INDIGO	4,400.0	4,264.6	3.17
APOLLOHOSP	8,330.0	8,078.5	3.11
BAJAJ-AUTO	10,650	10,462.5	1.79
TRENT	4,172.9	4,099.9	1.78

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
BAJFINANCE	908.10	923.10	-1.62
HINDUNILVR	2,178.4	2,209.3	-1.40
TECHM	1,419.8	1,439.0	-1.33
INFY	1,178.2	1,193.7	-1.30
BAJAJFINSV	1,750.0	1,772.0	-1.24

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	3,46,64,725	758.80	2,636.3
RELIANCE	1,71,50,630	1,349.0	2,320.1
ICICIBANK	1,43,94,386	1,244.4	1,788.4
GRASIM	44,17,489	3,162.0	1,379.4
BHARTIARTL	64,19,014	1,884.0	1,217.3

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	3,46,64,725	758.80	2,636.3
TATASTEEL	2,43,85,712	208.64	509.15
ITC	2,18,68,988	307.65	673.43
ETERNAL	2,16,76,835	241.80	529.33
BEL	1,97,89,651	420.10	833.94



Indian equity benchmarks erased early gains to close marginally lower on Thursday, weighed down by losses in financial, IT and FMCG stocks. The markets opened gap-down amid rising optimism over a potential peace agreement between the US and Iran. However, indices turned volatile in the afternoon session and eventually settled lower due to persistent selling pressure from foreign institutional investors. Traders overlooked the government data showed that production growth in eight core infrastructure sectors rose 1.7% in April, driven by higher output of steel, cement and electricity, from 1% in the same month last year and 1.2% in March. Traders took note of the HSBC Flash India Manufacturing PMI eased from final reading of 54.7 in April to 54.3 in May, while HSBC Flash India Services PMI Business Activity Index rose to 58.9 in May from April's final reading of 58.8.

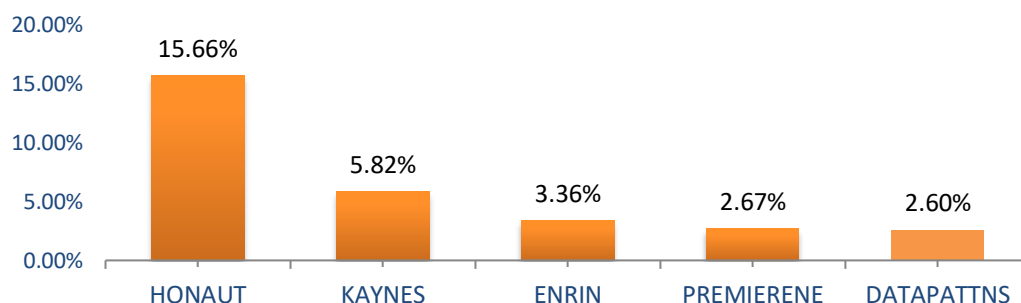
On the global front, European markets were trading higher as traders monitored peace talks between the United States and Iran. Asian markets closed mostly in green after Japan posted a merchandise trade surplus of 301.9 billion yen in April. That blew away forecasts for a deficit of 29.7 billion yen following the 643.0 billion yen surplus in March.

Source: AceEquity

NEWS BULLETIN

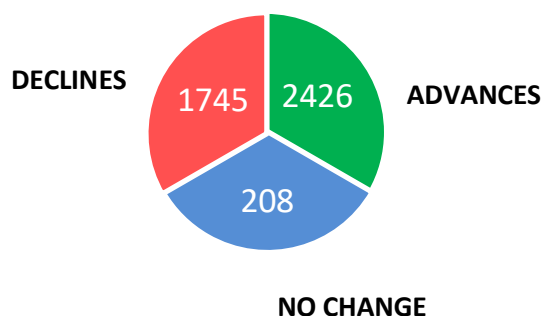
- **Dhabriya Polywood** has received work orders worth Rs 10.90 crore (including GST). Of the total, the company secured an order worth Rs 8.47 crore from ARASA Projects for the supply and installation of uPVC windows & doors. The project is scheduled to be completed within 24 months.
- **INOX India** has received orders worth Rs 322 crore since April 2026, across the business segments of Industrial Gas, Cryo-scientific Solutions and LNG. The order split includes Rs 242 crore in the Industrial Gas segment, Rs 39 crore in the LNG segment and Rs 38 crore in the Cryo-scientific solutions segment, besides other orders.
- **Karnataka Bank** has reported 61.74% rise in its net profit at Rs 408.19 crore for fourth quarter ended March 31, 2026 (Q4FY26) as compared to Rs 252.37 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : CAPITAL GOODS

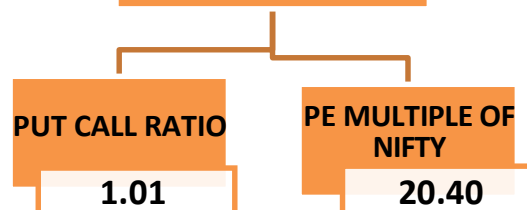


S&P BSE: CAPITAL GOODS
CLOSING: 78,274.90
CHANGE: + 996.42
CHANGE: + 1.29%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



[For Disclosure & Disclaimer, click here](#)