

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,346.17	73,935.83	74,544.24	73,807.30	74,360.01	+ 13.84	+ 0.02
NIFTY	23,405.60	23,282.45	23,465.30	23,247.30	23,416.55	+ 10.95	+ 0.05

INDICES CLOSED FLAT AHEAD OF RBI'S POLICY OUTCOME

The 30-share BSE Sensex was up by 13.84 points or 0.02% to settle at 74,360.01 and the Nifty was up by 10.95 points or 0.05% to settle at 23,416.55. The BSE Small Cap 250 was up by 0.60% and BSE 500 was up by 0.19%. On the sectoral front, Consumer Durables, Oil & Gas, Auto, Healthcare, Capital Goods, FMCG, Banks and Realty were gaining indices. On the flip side, IT and Metal were losing indices. Titan, Eternal, ITC, Tech Mahindra and SBIN were gainers on the Sensex; on the flip side, Infosys, Bajaj Finserv, Ultratech Cement, HCL Tech and Adani Ports 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 positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
TITAN	4,238.8	4,088.8	3.67
ETERNAL	254.40	247.00	3.00
CIPLA	1,402.0	1,375.2	1.95
COALINDIA	481.00	472.30	1.84
ADANIANT	2,977.9	2,925.6	1.79

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,204.4	1,222.6	-1.49
HINDALCO	1,125.1	1,138.9	-1.21
SBILIFE	1,763.0	1,784.2	-1.19
BAJAJFINSV	1,714.9	1,734.4	-1.12
ULTRACEMCO	11,000	11,101	-0.91

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,26,73,538	753.25	3,208.79
RELIANCE	2,34,74,327	1,308.0	3,059.06
ICICIBANK	1,94,61,560	1,253.0	2,436.39
SBIN	1,88,75,883	979.25	1,845.95
INFY	1,27,55,957	1,204.4	1,535.13

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,26,73,538	753.25	3,208.7
WIPRO	4,06,59,957	204.00	829.42
ETERNAL	3,66,90,161	254.40	933.47
RELIANCE	2,34,74,327	1,308.0	3,059.0
ITC	2,20,17,634	280.10	614.80



Indian equity benchmarks ended flat with positive bias on Thursday ahead of the RBI's monetary policy committee meet outcome on June 05, 2026. Markets made a negative start and witnessed volatility throughout the session as investors remained cautious amid ongoing uncertainty in West Asia and persistent foreign fund outflows. Finally, markets managed to close marginally higher. Sentiment remained upbeat as Union Minister of Commerce and Industry Piyush Goyal stated that India has emerged as the world's most trusted investment destination and outlined the Government's ongoing efforts to strengthen manufacturing, ease of doing business, infrastructure, technology adoption, and global trade engagement. Traders took some support with RBI Deputy Governor Swaminathan J stating that India's economic activity continues to show remarkable resilience, driven by strong industrial and services activity, broad-based demand, and improving corporate performance, despite rising global uncertainty.

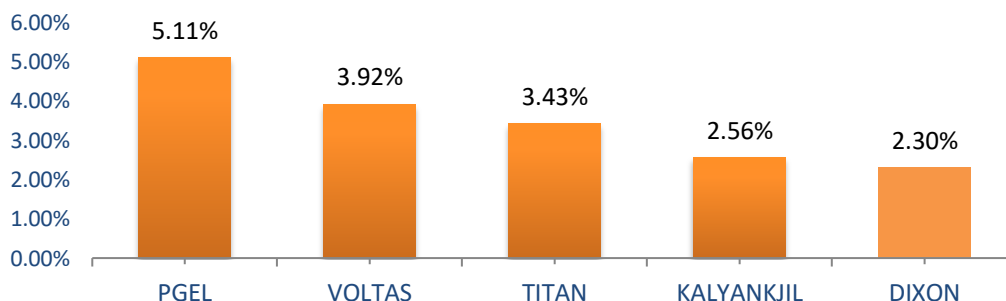
On the global front, European markets are trading mostly in green, after Israel and Lebanon agreed to renew their fragile ceasefire following several days of bombardment and drone strikes. Asian markets ended mostly in red, after new attacks in the Middle East stalled the signing of a U.S.-Iran peace agreement.

Source: AceEquity

NEWS BULLETIN

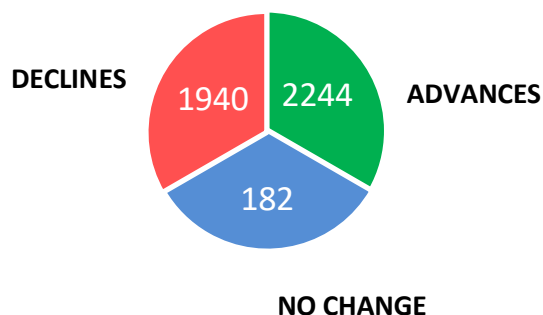
- **Agarwal Industrial Corporation** has secured a tender worth around Rs 477.50 crore from Hindustan Petroleum Corporation (HPCL). The tender involves supply of around 1,30,000 metric tonnes of Bulk Bitumen (VG-30 & VG-40 grades), at Mumbai and Mangalore locations. The supplies are to be completed between May 25, 2026 and May 24, 2027.
- **Highness Microelectronics** has received significant purchase order valued at around Rs 1.89 crore for the supply of specialized Rugged Displays for Ticket Vending Machines (TVM) to be used at various metro & urban mobility stations.
- **Angel One** has reported 19.47% growth in client base to 38.17 million in May 2026 as against 31.95 million recorded in May 2025. The company's client base rose by 1% Month-on-Month (MoM) from 37.79 million clients in April 2026.

MARKET DRIVING SECTOR : CONSUMER DURABLES

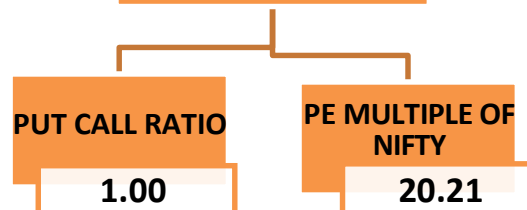


S&P BSE: CONSUMER DURABLES
CLOSING: 58,389.68
CHANGE: + 1,110.30
CHANGE: + 1.94%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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