



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,243.34	73,421.61	73,934.35	73,318.94	73,524.26	- 719.08	- 0.97
NIFTY	23,366.70	23,080.70	23,267.30	23,070.15	23,123.00	- 243.70	- 1.04

INDICES DECLINED SHARPLY AMID GLOBAL SELL OFF

The 30-share BSE Sensex was down by 719.08 points or 0.97% to settle at 73,524.26 and the Nifty was down by 243.70 points or 1.04% to settle at 23,123.00. The BSE Small Cap 250 was down by 1.88% and BSE 500 was down by 1.33%. On the sectoral front, there were no gaining indices. On the flip side, IT, Consumer Durables, Oil & Gas, Auto, Healthcare, Capital Goods, FMCG, Banks, Realty and Metal were losing indices. Powergrid, Tech Mahindra, BEL, Bharti Airtel and SBIN were gainers on the Sensex; on the flip side, Eternal, Indigo, M&M, Reliance and TCS 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 negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
MAXHEALTH	1,006.05	977.25	2.95
POWERGRID	290.00	285.65	1.52
BHARTIARTL	1,820.10	1,798.20	1.22
BEL	412.30	408.20	1.00
NESTLEIND	1,399.90	1,386.20	0.99

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
WIPRO	181.60	198.37	-8.45
JIOFIN	228.19	236.89	-3.67
ETERNAL	247.15	256.50	-3.65
HINDALCO	1,053.00	1,092.60	-3.62
SHRIRAMFIN	894.30	923.30	-3.14

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
RELIANCE	1,64,94,759	1,262.80	2,097.97
HDFCBANK	2,15,50,700	738.00	1,591.26
TCS	65,36,734	2,149.40	1,410.82
WIPRO	7,51,64,049	181.60	1,396.55
ICICIBANK	1,07,14,196	1,250.00	1,339.24

Most Active (by volume)			
Name	Qty	Pr.	Value CR
WIPRO	7,51,64,049	181.60	1,396.5
TATASTEEL	3,10,36,948	201.60	631.97
ETERNAL	2,51,26,663	247.15	629.52
HDFCBANK	2,15,50,700	738.00	1,591.2
RELIANCE	1,64,94,759	1,262.80	2,097.9



Indian equity benchmarks ended sharply lower on Monday, with both the Nifty and Sensex plunging around 1%, amid broad-based selling across sectors. Markets made a gap-down opening and remained under heavy selling pressure throughout session, due to weak global cues and escalating geopolitical tensions after fresh military exchanges between Israel and Iran, which dampened hopes of a potential US-Iran peace agreement. Traders remained cautious as the Reserve Bank of India (RBI) Governor Sanjay Malhotra cautioned that the projected shortfall in south-west monsoon rainfall could weigh on rural demand and private consumption. Traders overlooked Commerce and Industry Minister Piyush Goyal's statement that India and the US are moving towards closing all the open ends of the interim trade agreement, and both sides are likely to execute the very, very vibrant first phase of the pact by the middle of next month.

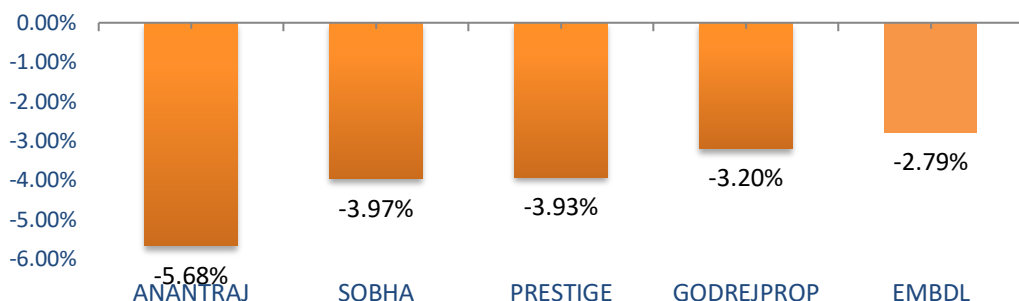
On the global front, European markets are trading in the red amid persistent concerns over escalating geopolitical tensions. Asian markets closed lower, tracking weak cues from Wall Street on Friday, where technology stocks declined sharply.

Source: AceEquity

NEWS BULLETIN

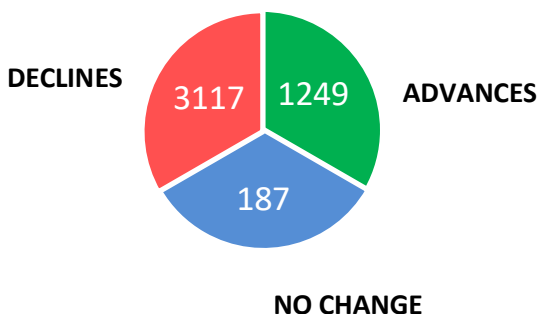
- **RailTel Corporation of India** has received the Letter of Acceptance (LoA) worth around Rs 82.04 crore (including tax) from Haryana Rail Infrastructure Development Corporation. The LoA is for the design SITC of S&T and associated works of Dhulawat Manesar New Patli section including Chandla Dunderwas and Pachgaon Halt Stations. The order is to be executed by November 27, 2027.
- **BCPL Railway Infrastructure** has bagged an order worth Rs 4.72 crore (Incl. GST) from Eastern Railway, Howrah Division. The letter of acceptance has been received for the work of 25 KV OHE work in connection with 'Replacement of old Guy Rod Assembly' under Howrah Division of Eastern Railway on June 04, 2026. The project is expected to be executed over a period of 18 months from date of letter of acceptance.

MARKET DRIVING SECTOR : REALTY

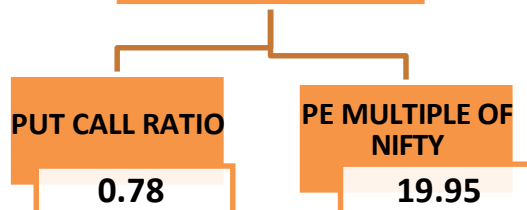


S&P BSE: REALTY
CLOSING: 5,841.46
CHANGE: - 154.38
CHANGE: - 2.57%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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