



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,555.44	81,845.50	82,408.54	81,833.69	82,352.64	-202.80	-0.25
NIFTY	25,279.85	25,089.95	25,216.00	25,083.80	25,198.70	-81.15	-0.32

## BOURSES CLOSED IN RED AMID WEAK GLOBAL CUES

The 30-share BSE Sensex was down by 202.80 points or 0.25% to settle at 82,352.64 and the Nifty was down by 81.15 points or 0.32% to settle at 25,198.70. The BSE Mid-Cap was down by 0.15% and BSE Small Cap was up by 0.26%. On the sectoral front, FMCG, Realty and Healthcare were the top gaining indices; on the flip side, Metal, Consumer Durables, Bank, Capital Goods, Auto, Oil & Gas and IT were losing indices. Asian Paint, Hindustan Unilever, Ultratech Cement, Sunpharma and Reliance were the top gainers on the Sensex; on the flip side, ICICI Bank, SBIN, Axis Bank, Mahindra & Mahindra and Infosys were the top losers on the Sensex. On global front, Asian markets shut the day on a negative note and European indices are trading on a red note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
ASIANPAINT	3,233.80	3,154.85	2.50
GRASIM	2,758.50	2,706.85	1.91
HINDUNILVR	2,841.95	2,794.30	1.71
ULTRACEMCO	11,601.25	11,460.80	1.23
SUNPHARMA	1,833.00	1,811.50	1.19

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
WIPRO	519.65	536.05	-3.06
COALINDIA	505.00	519.60	-2.81
ONGC	314.90	322.20	-2.27
HINDALCO	666.00	678.90	-1.90
LTIM	6,074.80	6,145.70	-1.15

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,23,41,372	1,641.05	2,023.42
RELIANCE	59,91,652	3,031.95	1,811.46
ICICIBANK	1,35,05,843	1,234.80	1,671.92
INFY	47,78,310	1,920.70	914.11
MARUTI	7,35,076	12,370	905.22

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	3,96,13,696	150.95	597.65
ONGC	2,53,97,204	314.90	796.48
BPCL	1,94,16,507	357.00	697.23
COALINDIA	1,67,83,593	505.00	847.37
ICICIBANK	1,35,05,843	1,234.80	1,671.9



Bears took full control on Indian equity benchmarks on Wednesday with concerns about an imminent slowdown in the United States. Weakness in global markets pressurized the domestic markets to trade lower during the day. Markets made negative start and remained lower tracking sell-off on the Wall Street overnight. India's services sector activity expanded in the month of August to the greatest extent since March as growth of incoming new business ticked higher. Traders overlooked the government data showing that foreign direct investment in India jumped 47.8 per cent to \$16.17 billion in April-June this fiscal on healthy inflows in services, computer, telecom and pharma sectors. FDI inflows were at \$10.94 billion in April-June 2023-24. Investors were cautious with Credit rating agency ICRA's report stated that the increasing delinquencies in the microfinance sector, which is likely to push up the Non-banking finance companies - microfinance institutions (NBFC-MFI) credit costs to 320-340 bps in FY2025 from 220 bps in FY2024.

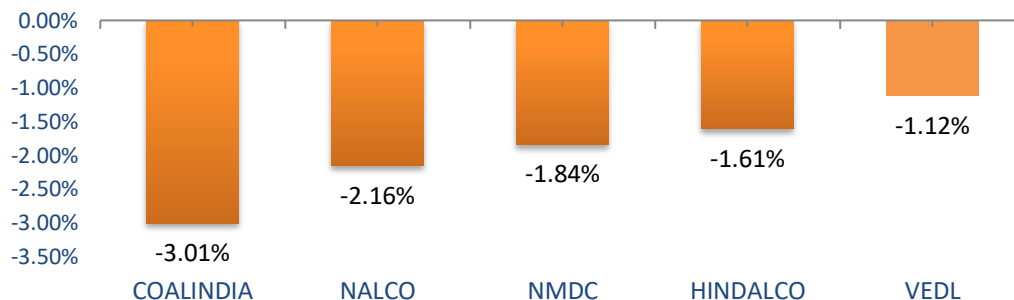
On the global front, European markets were trading lower as investors awaited more economic readings this week for clues on the Federal Reserve's rate-cutting cycle. Asian markets ended mostly in red as China's service sector continued to expand but the pace of expansion eased since July on softening incoming new business.

Source: AceEquity

## NEWS BULLETIN

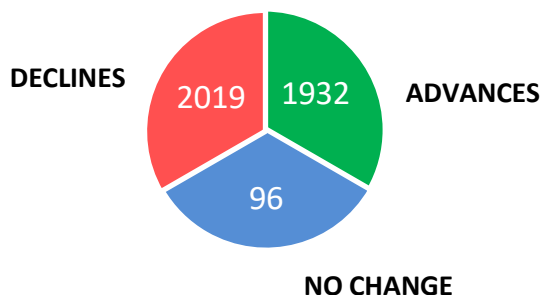
- **Hindustan Aeronautics (HAL)** has secured order of over Rs 26,000 crore inclusive of all taxes and duties for supply of 240 aero-engines (AL-31FP) for Su-30 MKI aircraft of the Indian Air Force (IAF) under Buy (Indian) category.
- **Havells India** has launched its latest innovation - the Studio Meditate AP400 and AP250 air purifiers. Building on the success of the previously launched Studio Meditate Air Purifier, which was praised for its SpaceTech technology.
- **Axis Bank** has introduced two innovative, industry-first digital solutions at the recently held the Global Fintech Fest (GFF) event. The Bank launched 'UPI-ATM', an integrated Android Cash Recycler with Unified Payments Interface (UPI) technology for cardless cash withdrawal and deposits.

## MARKET DRIVING SECTOR : METAL

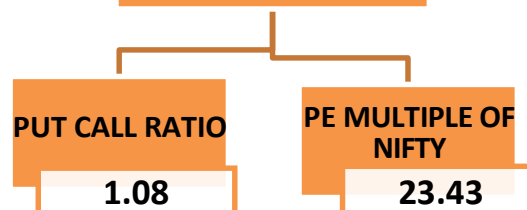


**S&P BSE: METAL**  
**CLOSING: 31,530.51**  
**CHANGE: - 353.66**  
**CHANGE: - 1.11%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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