

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	81,921.29	81,928.12	82,134.95	81,423.14	81,523.16	-398.13	-0.49
NIFTY	25,041.10	25,034.00	25,113.70	24,885.15	24,918.45	-122.65	-0.49

MARKET CAUTIOUS AHEAD OF INFLATION DATA

The 30-share BSE Sensex was down by 398.13 points or 0.49% to settle at 81,523.16 and the Nifty was down by 122.65 points or 0.49% to settle at 24,918.45. The BSE Mid-Cap was down by 0.52% and BSE Small Cap was down by 0.57%. On the sectoral front, FMCG and Consumer Durables were gaining indices; on the flip side, Oil & Gas, IT, Auto, Healthcare, Realty, Metal, Capital Goods and Bank was losing indices. Asian Paint, Bajaj Finance, Hindustan Unilever, Sunpharma and Bajaj Finserv were the top gainers on the Sensex; on the flip side, Tata Motors, SBIN, NTPC, Adani Ports and Larsen & Toubro 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 green note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
BAJAJ-AUTO	11,430.15	10,987.75	4.03
ASIANPAINT	3,368.50	3,295.05	2.23
BAJFINANCE	7,361.00	7,241.85	1.65
SHRIRAMFIN	3,288.00	3,260.05	0.86
BRITANNIA	6,017.75	5,969.90	0.80

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TATAMOTORS	976.40	1,035.80	-5.73
ONGC	286.90	295.60	-2.94
WIPRO	516.00	525.75	-1.85
LT	3,540.00	3,596.15	-1.56
ADANIANT	2,940.00	2,986.40	-1.55

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
TATAMOTOR	3,61,40,411	976.40	3,555.42
HDFCBANK	1,11,13,342	1,650.00	1,829.09
SBIN	2,00,60,665	771.00	1,556.11
ICICIBANK	1,19,93,242	1,238.00	1,480.79
BAJAJ-AUTO	12,83,385	11,430.1	1,457.99

Most Active (by volume)

Name	Qty	Pr.	Value CR
ONGC	4,48,26,300	286.90	1,287.9
TATAMOTOR	3,61,40,411	976.40	3,555.4
TATASTEEL	2,46,33,287	148.38	366.79
SBIN	2,00,60,665	771.00	1,556.1
ITC	1,49,22,832	513.10	770.72



Local markets lost steam in last leg of trade and ended near day's low levels on Wednesday. Traders were cautious ahead of India's inflation data due on tomorrow. Markets made cautious start and turned volatile tracking weakness in Asian counterparts and mixed cues from Wall Street overnight due to lingering concerns surrounding U.S. and Chinese growth. Further, markets managed to trade above neutral lines in late morning session. Traders took note of Fitch Ratings' statement that India remains committed to reducing the budget deficit over the medium term, despite its focus on higher public capex and demands of the coalition government. It said India has achieved or outperformed its budget deficit targets in the last few years, thereby improving its fiscal credibility. In afternoon session, markets remained in green even after private report stated that India's gross domestic product (GDP) growth to soften to 6.7% in FY25, below the Reserve Bank of India's forecast of 7.2% and downside risks to its FY26 GDP forecast of 7.2% as growth signals are currently mixed.

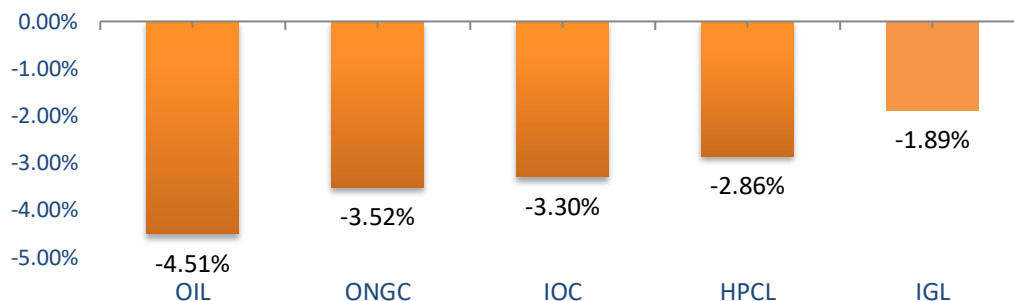
On the global front, European markets were trading mostly in green ahead of key U.S. consumer price inflation data due later in the day and a European Central Bank (ECB) policy meeting on Thursday. The ECB is expected to cut its deposit rate by 25 basis points on Sept. 12 and again in December.

Source: AceEquity

NEWS BULLETIN

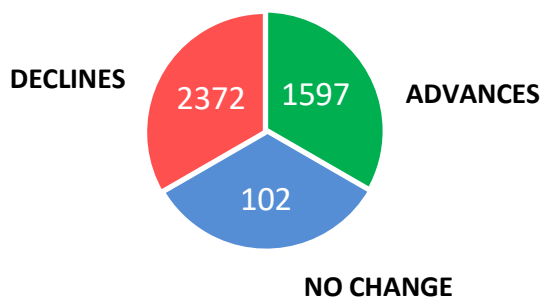
- **Bharat Electronics (BEL)** has secured an order worth Rs 850 crore from Cochin Shipyard (CSL) for the supply of indigenous Multi Function Radar in X Band. This fully indigenous radar designed by DRDO and manufactured by BEL is capable of detecting, acquiring and tracking airborne targets to provide protection to naval ships.
- **Khadim India** has entered into a tie-up with Underlinen Fashion House, exclusive licensee and Master Distributor for Puma Socks and other Puma products in India.
- **BCPL Railway Infrastructure** has received an order for execution of an Upgradation of Electric Traction System project in Kharagpur-Bhadrak section of Kharagpur Division of South Eastern Railway under Rail Vikas Nigam.
- **Tech Mahindra** has won the 2024 Oracle Partner Awards in the Applications / SaaS EMEA Innovation Category.

MARKET DRIVING SECTOR : OIL & GAS

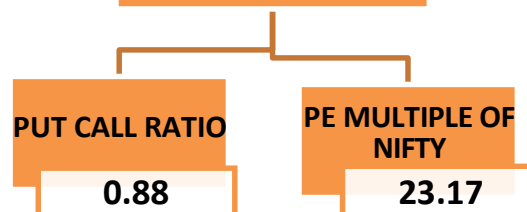


S&P BSE: OIL & GAS
CLOSING: 30,360.95
CHANGE: - 699.63
CHANGE: - 2.25%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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