

COMMENTARY

26 Nov 2024

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,109.85	80,415.47	80,482.36	79,798.67	80,004.06	-105.79	-0.13
NIFTY	24,221.90	24,343.30	24,343.30	24,125.40	24,194.50	-27.40	-0.11

INDICES TRADED IN A NARROW RANGE

The 30-share BSE Sensex was down by 105.79 points or 0.13% to settle at 80,004.06 and the Nifty was down by 27.40 points or 0.11% to settle at 24,194.50. The BSE Mid-Cap was up by 0.10% and BSE Small Cap was up by 0.62%. On the sectoral front, IT, Realty, FMCG, and Metal were gaining indices; on the flip side, Auto, Capital Goods, Healthcare, Oil & Gas, Consumer Durables and Bank were losing indices. Asian Paint, Infosys, JSW Steel, TCS and Reliance were the top gainers on the Sensex; on the flip side, Adani Ports, Ultratech Cement, Sunpharma, NTPC and Mahindra & Mahindra 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
SHRIRAMFIN	3,044.00	2,947.80	3.26
BRITANNIA	5,012.00	4,903.95	2.20
ASIANPAINT	2,505.70	2,459.70	1.87
BEL	297.80	292.35	1.86
INFY	1,920.20	1,889.70	1.61

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIENT	2,166.85	2,257.50	-4.02
ULTRACEMCO	11,110.85	11,457.45	-3.03
ADANI PORTS	1,131.50	1,166.80	-3.03
BAJAJ-AUTO	9,151.00	9,420.95	-2.87
SUNPHARMA	1,763.35	1,798.90	-1.98

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,54,67,783	1,786.40	2,760.60
ADANIENT	77,23,187	2,166.85	1,691.08
INFY	68,50,495	1,920.20	1,319.65
RELIANCE	92,47,557	1,295.60	1,194.81
ICICIBANK	76,46,955	1,304.80	998.77

Most Active (by volume)

Name	Qty	Pr.	Value CR
BEL	2,73,47,402	297.80	816.37
TATASTEEL	2,56,08,469	144.42	370.96
HDFCBANK	1,54,67,783	1,786.40	2,760.6
POWERGRID	1,39,97,179	337.90	476.38
NTPC	1,12,22,231	362.00	407.32



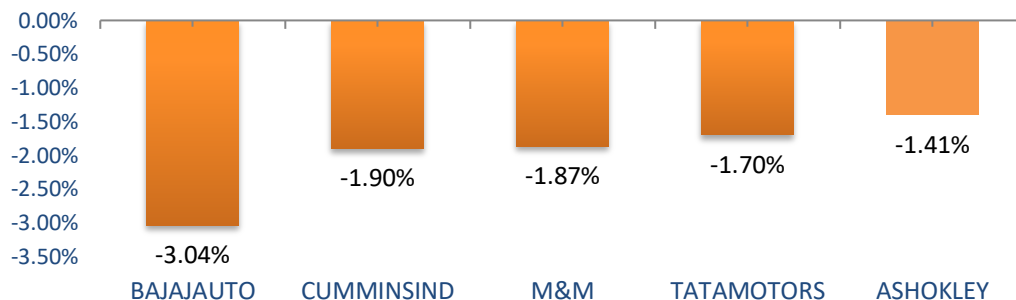
Tuesday turned out to be a volatile session for Indian equity markets, with both Sensex and Nifty ending marginally lower. The start of the day was firm, tracking overnight gains on Wall Street. Overnight fall in crude oil prices also aided domestic sentiments. Indices cut their gains and remained lackluster throughout the day, as some cautiousness came after the finance ministry in a report said India's economic outlook for the coming months is cautiously optimistic, with agriculture likely to benefit from favourable monsoon conditions, increased minimum support prices and adequate supply of inputs. Also, it said India's export recovery may face challenges due to softening demand in developed markets. Traders remained cautious after a private report said that India's economy likely grew at its slowest pace in one-and-a-half years in the three months to end-September as weak consumption offset a strong recovery in government spending, which for years has helped drive growth. However, in the last hours of the trade, markets witnessed recovery to end near neutral lines.

On the global front, European markets were trading lower, after UK shop prices dropped at a slower pace in November, signalling that shoppers are set to face rising price pressures. The British Retail Consortium revealed that the shop price index declined 0.6 percent on a yearly basis in November, slower than October's 0.8 percent decrease. Source: AceEquity

NEWS BULLETIN

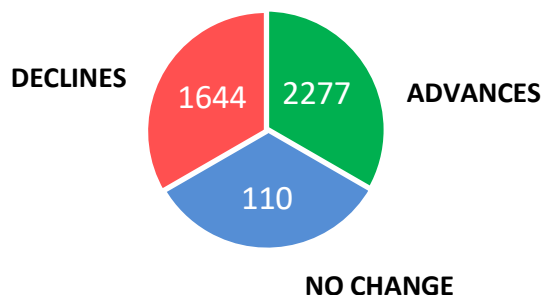
- **Bharat Global Developers (BGDL)** has secured a significant order worth Rs 156 crore from UPL Agro, a renowned leader in the agricultural sector. This milestone order highlights the company's commitment to excellence and its ability to fulfill large-scale demands while adhering to the highest quality standards.
- **Premier Energies** has received and accepted multiple orders aggregating to Rs 1087 crore from 2 large Independent Power Producers (IPP) and 1 other customer. These orders include Rs 964 crore for solar modules and Rs 123 crore for solar cells. The supply of these modules is scheduled to commence from January 2025.
- **Dev Information Technology (DEVIT)** has secured a new order from Bhavnagar Municipal Corporation. The order, valued at approximately Rs 84.5 lakh, involves the Annual Maintenance and Development of the Online Property Tax System.

MARKET DRIVING SECTOR : AUTO

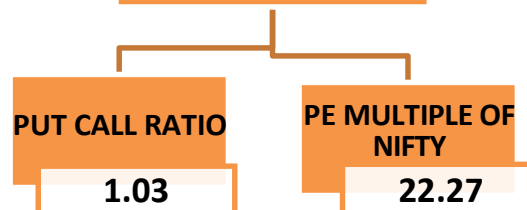


S&P BSE: AUTO
CLOSING: 52,921.21
CHANGE: - 673.29
CHANGE: - 1.26 %

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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