

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,234.08	80,281.64	80,447.40	78,918.92	79,043.74	-1,190.34	-1.48
NIFTY	24,274.90	24,274.15	24,345.75	23,873.35	23,914.15	-360.75	-1.49

INDICES SHUT THE DAY IN DEEP RED

The 30-share BSE Sensex was down by 1,190.34 points or 1.48% to settle at 79,043.74 and the Nifty was down by 360.75 points or 1.49% to settle at 23,914.15. The BSE Mid-Cap was down by 0.06% and BSE Small Cap was up by 0.41%. On the sectoral front, Oil & Gas and Realty were gaining indices; on the flip side, IT, Capital Goods, FMCG, Auto, Bank, Consumer Durables, Metal and Healthcare were losing indices. SBIN was the top gainer on the Sensex; on the flip side, Infosys, Mahindra & Mahindra, Bajaj Finance, Adani Ports and HCL Tech 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
ADANIENT	2,437.00	2,397.80	1.63
SBIN	840.55	834.10	0.77
SHRIRAMFIN	3,037.95	3,019.00	0.63
CIPLA	1,498.15	1,491.15	0.47

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
SBILIFE	1,424.00	1,505.40	-5.41
HDFCLIFE	655.10	680.55	-3.74
M&M	2,904.00	3,004.80	-3.35
INFY	1,860.30	1,924.50	-3.34
ADANI PORTS	1,169.55	1,199.95	-2.53

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
ADANIENT	1,44,45,549	2,437.00	3,564.76
HDFCBANK	1,78,61,196	1,793.00	3,230.11
ICICIBANK	2,28,03,745	1,287.50	2,947.79
RELIANCE	1,50,27,412	1,272.75	1,924.61
ADANI PORTS	1,56,02,469	1,169.55	1,862.51

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	3,09,47,861	143.63	446.05
BEL	2,77,72,319	305.80	851.75
ICICIBANK	2,28,03,745	1,287.50	2,947.7
HDFCBANK	1,78,61,196	1,793.00	3,230.1
POWERGRID	1,69,20,231	334.30	565.74



Indian equity markets witnessed a massive crash on Thursday, as solid U.S. economic data along with an uptick in inflation supported recent comments by many Fed officials that there's no rush to cut rates. After a cautious start, indices fell in red and kept on compounding their losses, as traders remained cautious ahead of India's GDP growth data for the latest July-September 2024 quarter (Q2 FY25) to be released on Friday. In late afternoon deals, a selling pressure intensified over the Dalal Street, despite positive cues from European markets. Investors paid no heed towards India Ratings and Research's (Ind-Ra) statement that the government will be able to register the fiscal deficit at 4.75 per cent in FY25, 0.19 per cent lower than the budget aim, by reigning in expenditure. It added the revenue expenditure, excluding subsidies, will be 0.12 per cent of GDP, lower than the budget estimate.

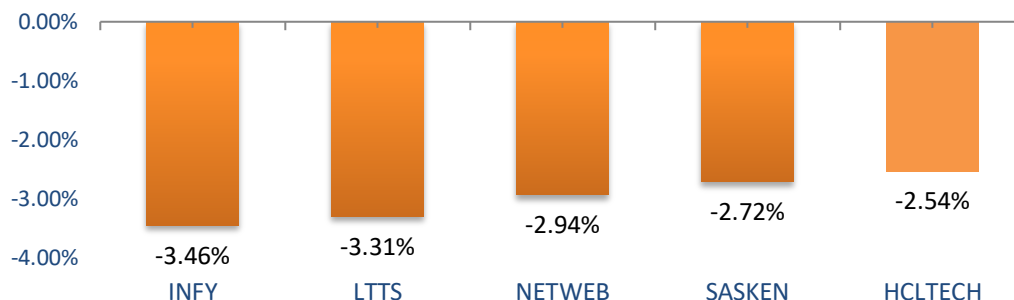
On the global front, European markets were trading higher, even as Spain's consumer price inflation increased more than expected in November to the highest level in four months. The flash data from the statistical office INE showed that consumer price inflation rose to 2.4 percent in November from 1.8 percent in October. That was just above the expected rate of 2.3 percent.

Source: AceEquity

NEWS BULLETIN

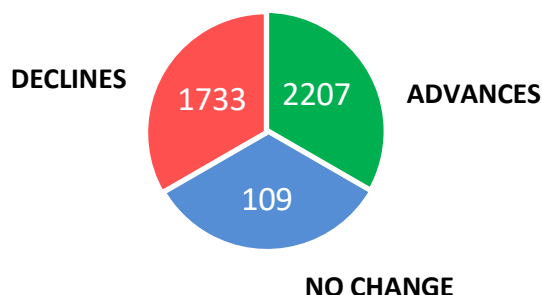
- **Sunita Tools** has received the contract for supply of different kinds of Mould Base totaling to Rs 1.29 crore (including tax) apart from the Work in Progress of 11.08 crore.
- **KEC International** has secured prestigious turnkey orders of Rs 1,704 crore in its Transmission & Distribution (T&D) business for Design, Supply and Installation of 765 kV Transmission Lines and GIS Substations from Power Grid Corporation of India (PGCIL).
- **NBCC (India)** has signed MoU with Housing & Urban Development Corporation (HUDCO) for development of 10-acre institutional plot at Noida as Project Management Consultant. The tentative cost of the project is around Rs 600 crore.

MARKET DRIVING SECTOR : IT

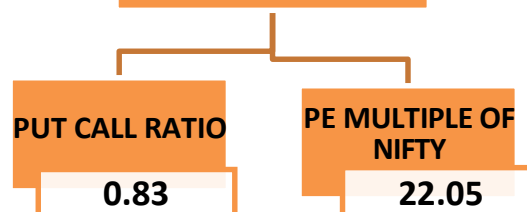


S&P BSE: IT
CLOSING: 42,654.18
CHANGE: - 986.97
CHANGE: - 2.26 %

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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