



| Index  | Previous Close | Open      | High      | Low       | Close     | Change  | Change% |
|--------|----------------|-----------|-----------|-----------|-----------|---------|---------|
| Sensex | 38877.12       | 38,935.75 | 38,939.35 | 38,581.04 | 38684.72  | -192.40 | -0.49   |
| Nifty  | 11,643.95      | 11,660.20 | 11,662.55 | 11,559.20 | 11,598.00 | -45.95  | -0.39   |

## RATE CUT FAILED TO IMPRERSS THE MARKET

The 30-share BSE Sensex lost 192.40 points or 0.49% to settle at 38684.72 and the Nifty lost 45.95 points or 0.39% to settle at 11598. The BSE Mid-Cap lost 0.14%.The BSE Small-Cap lost 0.32%. On the Sectoral front Information Auto, Healthcare and Realty were the gaining indices on BSE while on the flipside Oil & Gas, Bank and IT were the major loosing indices. The top gainers on the Sensex were Tata Motors, Hero Motocorp, Bharti Airtel, HDFC and Asian Paints while on the flip side TCS, HCL Tech, Yes Bank, Indusind Bank and Reliance were the top losers. On global front, Asian markets shut the day on a green note and European indices were trading on a red note.

| Top Gainers |             |              |      |
|-------------|-------------|--------------|------|
| Name        | Closing Pr. | Previous Pr. | %Ch  |
| IBULHSGFIN  | 898.50      | 869.85       | 3.29 |
| ZEEL        | 417.80      | 404.55       | 3.28 |
| TATAMOTORS  | 206.30      | 201.35       | 2.46 |
| ULTRACEMCO  | 4,100.00    | 4,001.60     | 2.46 |
| BRITANNIA   | 3,050.00    | 2,990.10     | 2.00 |

| Top Losers |             |              |       |
|------------|-------------|--------------|-------|
| Name       | Closing Pr. | Previous Pr. | %Ch   |
| TCS        | 2017.00     | 2079.30      | -3.00 |
| HCLTECH    | 1090.35     | 1120.60      | -2.70 |
| BPCL       | 353.90      | 363.20       | -2.56 |
| HINDALCO   | 210.50      | 215.95       | -2.52 |
| YESBANK    | 268.30      | 273.70       | -1.97 |

## MARKET STATS

| Most Active (by value) |             |         |         |
|------------------------|-------------|---------|---------|
| Name                   | Qty         | Pr.     | Value   |
| IBULHSGFIN             | 2,10,62,041 | 898.50  | 1876.31 |
| RELIANCE               | 83,75,674   | 1354.50 | 1139.61 |
| YESBANK                | 4,20,03,554 | 268.30  | 1128.71 |
| MARUTI                 | 13,88,375   | 7108.90 | 988.22  |
| HDFC                   | 44,63,212   | 2041.90 | 909.35  |

| Most Active (by volume) |              |       |        |
|-------------------------|--------------|-------|--------|
| Name                    | Qty          | Pr.   | Value  |
| IDEA                    | 11,50,62,504 | 15.15 | 175.70 |
| RCOM                    | 10,48,87,888 | 3.50  | 37.13  |
| SUZLON                  | 9,49,31,087  | 6.75  | 61.99  |
| DISHTV                  | 5,94,39,140  | 39.10 | 236.44 |
| PNB                     | 4,57,41,687  | 93.70 | 431.02 |



Indian equity benchmarks ended today's trade on pessimistic note, even AFTER Reserve Bank of India (RBI) slashed repo rate by 25 bps to 6 percent as expected and kept the stance unchanged to Neutral. Markets seemed to be weak in the last leg of trade, as sentiments on the street weakened with data showing that the country's services sector activity eased with slowest pace of output growth in last six-months. However, the markets managed to recover from day's low points in last minutes of trade due to high expectations that India's exports will gain momentum ,on account of healthy growth in sectors such as pharmaceuticals. On the global front, Asian markets ended mostly in green after recent string of gains on optimism that the US and China are closer to a trade deal that would put an end to their ongoing trade war.

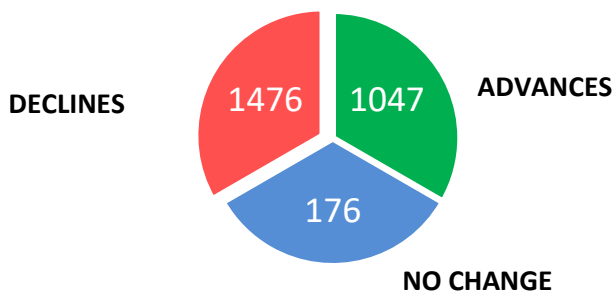
### NEWS BULLETIN

- **Larsen & Toubro's** (L&T) wholly owned subsidiary -- L&T Hydrocarbon Engineering (LTHE) has won contracts of significant value across various business segments. The secured order is in the range of Rs 1000 to 2500 crore.
- **Mahanagar Gas** has increased basic prices of compressed natural gas (CNG) and domestic piped natural gas (PNG) by Rs 1.51 per kg and Rs 1.88 per SCM, respectively effective from April 04.
- **Manappuram Finance** has signed a MoU with Autolite (India) (AIL) for a consumer and dealer financing agreement for electric vehicles.
- **NTPC's** Vindhyachal Thermal Power Station has generated record 37,538.97 million units (MUs) in 2018-19 through enhanced operational efficiency.

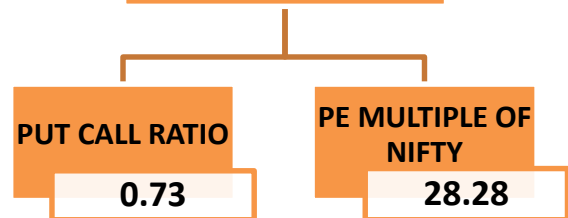
### MARKET DRIVING SECTOR : IT



### MARKET BREADTH - POSITIVE



### RATIO ANALYSIS



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