

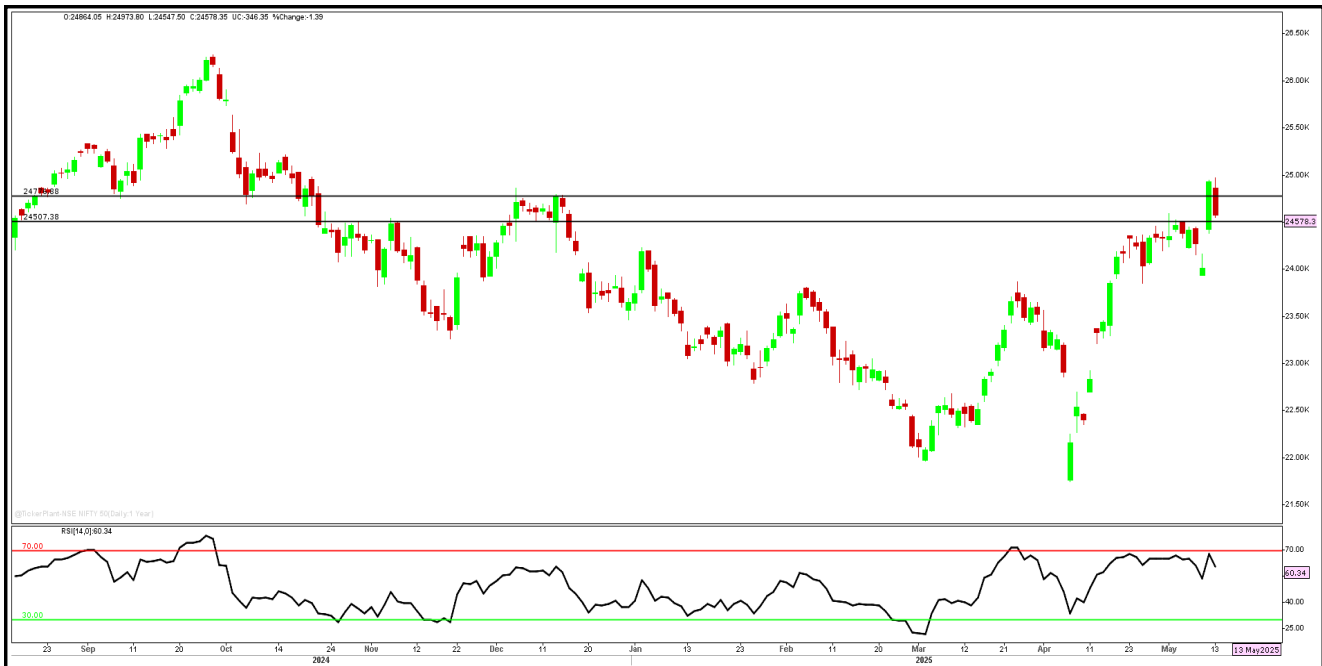
## PROGRESSIVE'S EVENING STROLL

DATE: 13 May, 2025

### Market Snapshot:

Today's trading session was marked by extreme volatility. After a weak opening, the Index continued to trade lower, despite a brief recovery attempt that quickly lost momentum. This led to a further slide, with the Index ending the day in red at 24,578.35 with a loss of 346.35 points. Among the sectors, Media and PSU Banks outperformed, while IT and FMCG stocks lagged. Meanwhile, Mid and Smallcap segments showed resilience and outperformed Nifty50.

### HOW THE DAY TRENDED



INDICES			
Index	Close	Points	%Chg.
Sensex	81148.22	(1281.68)	(1.55)
Nifty50	24578.35	(346.35)	(1.39)
Nifty Midcap 100	55520.70	104.65	0.19
Nifty Small Cap 100	16903.40	136.10	0.81

SECTORAL GAINERS / LOSERS			
Sectors	Close	Points	%Chg.
NIFTY MEDIA	1616.50	26.40	1.66
NIFTY PSU BANK	6572.50	101.10	1.56
NIFTY FMCG	56334.15	(767.25)	(1.34)
NIFTY IT	37354.60	(927.95)	(2.42)

NIFTY TOP GAINERS / LOSERS					
Gainers	CMP (Rs)	%Chg.	Losers	CMP (Rs)	%Chg.
BEL	335.75	4.01	INFY	1568.60	(3.58)
HERO MOTOCORP	4063.60	1.97	POWER GRID	298.45	(3.43)
JIOFIN	267.40	1.71	ETERNAL	231.65	(3.28)
DR REDDY	1207.10	0.96	HCL TECH	1619.60	(3.04)

### INDICES LEVELS FOR May 14, 2025

Nifty (future)	
Resistance	24840
Support	24500

Bank Nifty (future)	
Resistance	55670
Support	54480



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**KEY TAKEAWAYS OF THE DAY**

◆ **LTIMindtree secures USD450mn seven-year AI-driven deal with global agribusiness leader:**

The company has secured its largest-ever USD450mn deal over seven years with a global agribusiness giant to deliver AI-powered IT, infrastructure, and cybersecurity services using platforms like SAP S/4HANA, Azure, and ServiceNow, boosting efficiency and global scalability.

◆ **KEC International secures Rs10.34bn new orders in semiconductor and STATCOM segments:**

The company has secured Rs10.34bn new orders across multiple business segments. The new orders include a STATCOM project from a global OEM in India and supply contracts for towers, hardware, and poles in the Americas through its T&D division. The civil business secured a contract to establish a semiconductor plant for a prominent private player in India and an upstream project for a leading steel company. The cables division received orders for supplying various types of cables across India.

◆ **DCX Systems received export purchase orders worth Rs286mn:**

The company has received cumulatively exports orders amounting to Rs286mn from different customers in the normal course of business.

◆ **HFCL bags Rs1570mn order from Tera Software for BharatNet Phase III optical fiber cables:**

The company has secured a purchase order aggregating to Rs1570mn for the supply of various types of optical fiber cables for the BharatNet Phase III Project in the West Bengal Telecom Circle, from Tera Software, a consortium partner of ITI. The project needs to be executed within 3 years.

◆ **Premier Explosives ordered factory closure after April 29 accident:**

The company has received closure orders dated May 07, 2025, from the Telangana Pollution Control Board, Hyderabad, Telangana, to stop all industrial activities with immediate effect, in the company's factory situated at Katepally Village, Motakondur Mandal, Yadadri-Bhuvanagiri District, Telangana, where an accident occurred on April 29, 2025.

**Source: Media Reports**



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