

19 July 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	66,795.14	66,905.01	67,171.38	66,703.61	67,097.44	+302.30	+0.45%
NIFTY	19,749.25	19,802.95	19,851.70	19,727.45	19,833.15	+83.90	+0.42%

## FAG END BUYING DRIVES INDICES TO ALL TIME HIGHS

The 30-share BSE Sensex was up by 302.30 points or 0.45% to settle at 67,097.44 and the Nifty was up by 83.90 points or 0.42% to settle at 19,833.15. The BSE Mid-Cap was up by 0.63% and BSE Small Cap was up by 0.61%. On the sectoral front, Consumer Durables, Healthcare, IT, Auto, Bank, Capital Goods, FMCG, Realty, Metal, and Oil & Gas were the top gaining indices; on the flip side, there was no losing Index. NTPC, Bajaj Finance, IndusInd Bank, Ultratech Cement, and Bajaj Finserv were the top gainers on the Sensex; on the flip side, TCS, Bharti Airtel, Maruti, and Hindustan Unilever were the top losers on the Sensex. On global front, Asian markets shut the day on a mixed note and European indices are trading on a green note.

IT

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
NTPC	192.70	187.35	2.86
BAJFINANCE	7,595.10	7,420.00	2.36
INDUSINDBK	1,420.70	1,390.25	2.19
ULTRACEMCO	8,344.00	8,176.00	2.05
BAJAJFINSV	1,649.00	1,618.30	1.90

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
HINDALCO	439.80	444.50	-1.06
HEROMOTO	3,088.05	3,116.40	-0.91
TCS	3,469.00	3,496.85	-0.80
BAJAJ-AUTO	4,833.00	4,860.60	-0.57
MARUTI	9,612.80	9,665.65	-0.55

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
RELIANCE	1,80,54,869	2,853.00	5,103.95
HDFCBANK	1,64,67,567	1,684.75	2,770.59
INFY	1,36,87,062	1,476.00	2,021.83
ICICIBANK	1,59,94,261	973.55	1,555.04
INDUSINDBK	88,50,582	1,420.70	1,260.55

Most Active (by volume)			
Name	Qty	Pr.	Value CR
NTPC	3,17,61,232	192.70	616.87
RELIANCE	1,80,54,869	2,853.00	5103.95
SBIN	1,75,56,585	600.85	1050.23
TATASTEEL	1,72,22,355	116.55	200.97
POWERGRID	1,72,16,156	243.75	419.56



Indian markets witnessed volatility in yet another session and concluded the Wednesday's session at fresh record highs. Globally, investors were looking forward to U.S initial jobless claims data which is scheduled to be released on July 20. Indices made optimistic start tracking overnight gains on Wall Street. Some support also came in as the Asian Development Bank (ADB) retained forecast for India's economic growth at 6.4 per cent for this fiscal year and 6.7 per cent for the next, as it's bullish that robust domestic demand will continue to support the region's recovery. However, markets failed to protect early gains and turned flat in late morning session. Traders were cautious with International Monetary Fund Managing Director (MD) Kristalina Georgieva's statement that the medium-term growth prospects for the global economy remain weak, and elevated food and fertilizer prices are particularly worrying. But, markets managed to recover from lows in afternoon session, as investors found some solace as State Bank of India (SBI) Chairman Dinesh Khara said the Reserve Bank of India is likely to maintain status quo in the upcoming monetary policy. Further, in last leg of trade, markets soared higher to touch their new intraday high points.

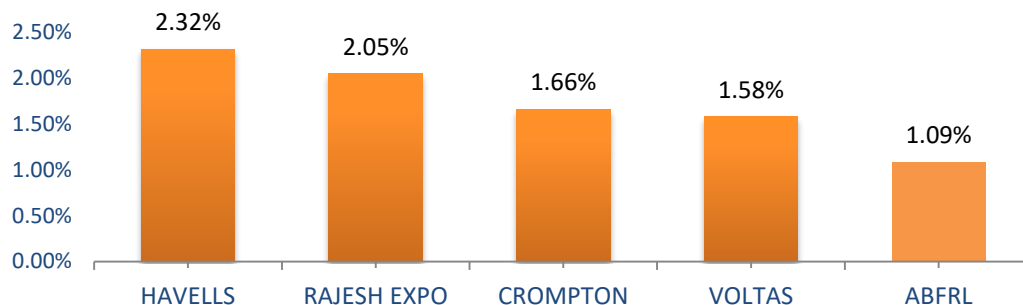
On the global front, European markets were trading higher on a boost from shares of Kering after top management changes at the luxury group. Asian markets ended mostly in green after Hong Kong's unemployment rate decreased further to the lowest level in nearly four years

Source: AceEquity

## NEWS BULLETIN

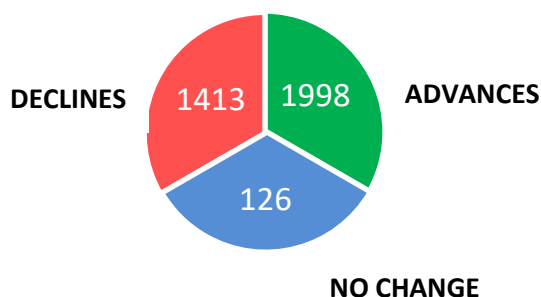
- **Mastek** has reported 12.84% fall in its net profit at Rs 73.53 crore for the quarter ended June 30, 2023 as compared to Rs 84.36 crore for the same quarter in the previous year.
- **HCL Technologies (HCLTech)** has launched its digital marketing technology solutions, Advantage Experience platform and Advantage Content Connect, on the Sitecore Partner Solution Catalog and Sitecore Marketplace. It provides an end-to-end framework to develop digital marketing capabilities for marketers across different digital touch points, leading to brand marketing, prospect conversion and retention.
- **Newgen Software Technologies** has reported 57.19% rise in its net profit at Rs 30.15 crore for the quarter ended June 30, 2023 as compared to Rs 19.18 crore for the same quarter in the previous year.
- **Bank of Maharashtra** reported 95.15% rise in its net profit at Rs 882.49 crore for the quarter ended June 30, 2023 as compared to Rs 452.20 crore for the same quarter in the previous year.

## MARKET DRIVING SECTOR : CONSUMER DURABLES

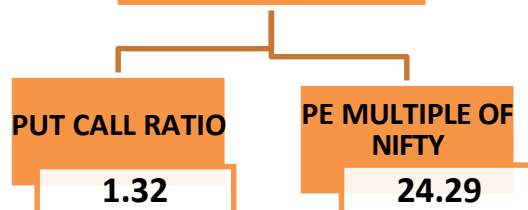


**S&P BSE: CONSUMER DURABLES**  
**CLOSING: 42,880.35**  
**CHANGE: +280.43**  
**% CHANGE: +0.66%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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