

21 July 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	67,571.90	66,907.07	67,190.52	66,533.74	66,684.26	-887.64	-1.31%
NIFTY	19,979.15	19,800.45	19,887.40	19,700.00	19,745.00	-234.15	-1.17%

IT SECTOR DRAGS INDICES LOWER

The 30-share BSE Sensex was down by 887.64 points or 1.31% to settle at 66,684.26 and the Nifty was down by 234.15 points or 1.17% to settle at 19,745.00. The BSE Mid-Cap was down by 0.26% and BSE Small Cap was up by 0.13%. On the sectoral front, Capital Goods, and Oil & Gas were the top gaining indices; on the flip side, IT, FMCG, Health Care, Auto, Bank, Consumer Durables, Realty and Metal were the top losing Indices. LT, NTPC, SBI, and Kotak Bank were the top gainers on the Sensex; on the flip side, Infosys, Hindustan Unilever, HCL Tech, and Wipro were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a red note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
LT	2,587.00	2,489.70	3.91
ONGC	170.55	167.20	2.00
NTPC	194.70	192.90	0.93
SBIN	615.35	610.05	0.87
TATAMOTORS	626.25	621.65	0.74

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,337.45	1,449.50	-7.73
HINDUNILVR	2,605.90	2,703.25	-3.60
HCLTECH	1,119.20	1,155.80	-3.17
WIPRO	404.90	417.65	-3.05
TCS	3,374.00	3,463.30	-2.58

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
INFY	4,55,48,305	1,337.45	6,072.64
RELIANCE	1,51,24,619	2,555.00	3,856.51
HDFCBANK	2,10,77,124	1,677.75	3,542.64
ICICIBANK	1,69,03,003	1,000.45	1,680.94
HINDUNILVR	51,98,952	2,605.90	1,366.91

Most Active (by volume)

Name	Qty	Pr.	Value CR
INFY	4,55,48,305	1,337.45	6072.64
TATASTEEL	3,15,46,136	116.70	367.95
HDFCBANK	2,10,77,124	1,677.75	3542.64
SBIN	2,10,40,281	615.35	1296.10
ICICIBANK	1,69,03,003	1,000.45	1680.94



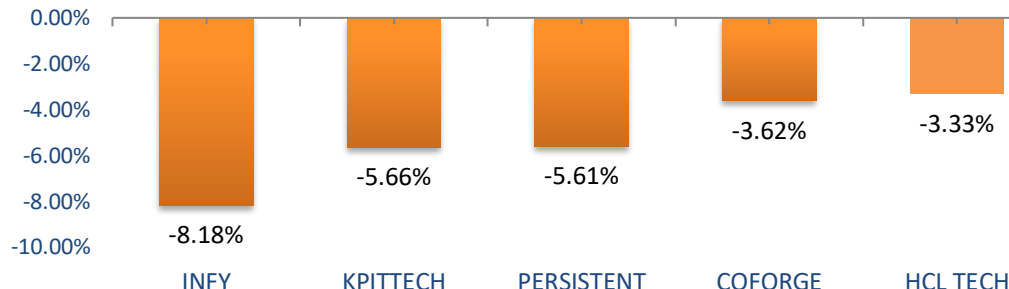
Indian equity markets took break from winning streak on Friday and ended the day with cut of over a percent. Bears took full control over markets, as traders sold-off their riskier shares. IT and Metal counters mainly pressurized the markets to trade lower during the day. As for broader indices, the BSE Mid cap index ended in red, while Small cap index managed to end in green. Globally investors were cautious ahead to next week's US Fed monetary policy meeting, where the Fed is widely expected to raise interest rates by another quarter point. Indices continued to trade under heavy selling pressure in late afternoon session, as sentiments got hit after retail inflation for farm workers and rural labourers inched up marginally to 6.31 per cent and 6.16 per cent, respectively in June as compared to 5.99 per cent and 5.84 per cent in May this year. . The All-India Consumer Price Index Number for Agricultural Labourers and Rural Labourers for June 2023 increased by 10 points each to 1,196 points and 1,207 points, respectively. CPI-AL and CPI-RL were 1,186 points and 1,197 points in May 2023.

On the global front, European markets were trading mostly in green as investors digested a fresh round of corporate earnings and looked ahead to a crucial Spanish election over the weekend. Asian markets ended mixed as fresh U.S. labor market data spurred concerns that the Federal Reserve will keep interest rates higher for longer to rein inflation. Source: AceEquity

NEWS BULLETIN

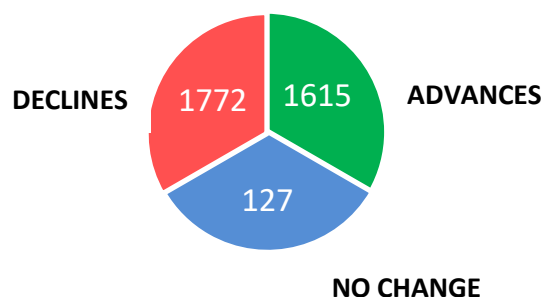
- **Hindustan Zinc** has reported 36.31% fall in its net profit at Rs 1970 crore for the quarter under review as compared to Rs 3093 crore for the same quarter in the previous year. Total income of the company decreased by 21.94% at Rs 7569 crore for Q1FY24 as compared Rs 9697 crore for Q1FY23
- **ICICI Securities** has reported 0.42% fall in its net profit at Rs 269.95 crore for the quarter under review as compared to Rs 271.09 crore for the same quarter in the previous year.
- **Ashok Leyland** has reported over 8 - fold jump in its net profit at Rs 576.42 crore for the quarter under review as compared to Rs 68.05 crore for the same quarter in the previous year.
- **JSW Steel** has reported 78.35% rise in its net profit at Rs 1,705 crore for the quarter under review as compared to Rs 956 crore for the same quarter in the previous year. Total income of the company increased by 5.87% at Rs 33,229 crore for Q1FY24 as compared Rs 31,388 crore for Q1FY23.

MARKET DRIVING SECTOR : IT

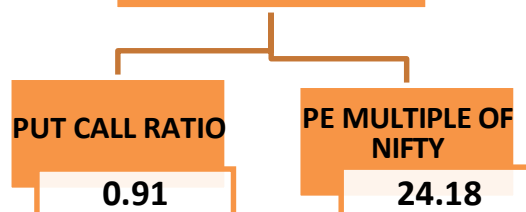


S&P BSE: IT
CLOSING: 30,099.24
CHANGE: -1,384.62
% CHANGE: -4.40%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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