

25 July 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	66,384.78	66,531.20	66,559.29	66,177.62	66,355.71	-29.07	-0.04%
NIFTY	19,672.35	19,729.35	19,729.35	19,615.95	19,680.60	+8.25	+0.04%

## BOURSES WIPE OPENING GAINS TO CLOSE FLAT

The 30-share BSE Sensex was down by 29.07 points or 0.04% to settle at 66,355.71 and the Nifty was up by 8.25 points or 0.04% to settle at 19,680.60. The BSE Mid-Cap was up by 0.39% and BSE Small Cap was up by 0.31%. On the sectoral front, Metal, Healthcare, Auto, Consumer Durables, and Oil & Gas were the top gaining indices; on the flip side, FMCG, IT, Bank, Capital Goods, and Realty were the top losing Indices. JSW Steel, Tata Steel, NTPC, and UltraTech Cement were the top gainers on the Sensex; on the flip side, Asian Paint, ITC, Larsen & Toubro, and SBI 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 positive note.

### Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
HINDALCO	450.25	432.95	4.00
JSWSTEEL	800.00	775.65	3.14
TATASTEEL	119.10	115.50	3.12
ULTRACEMCO	8,400.50	8,219.85	2.20
NTPC	200.00	195.90	2.09

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ASIANPAINT	3,395.00	3,543.70	-4.20
ITC	461.35	471.35	-2.12
LT	2,565.00	2,605.25	-1.54
BRITANNIA	4,896.00	4,968.90	-1.47
KOTAKBANK	1,871.65	1,897.25	-1.35

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	2,79,96,298	1,694.55	4,737.48
ICICIBANK	2,93,25,327	993.90	2,910.19
ITC	4,35,34,718	461.35	2,002.16
RELIANCE	60,13,010	2,484.00	1,498.86
KOTAKBANK	79,44,916	1,871.65	1,492.65

### Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	8,80,35,259	119.10	1041.19
ITC	4,35,34,718	461.35	2002.16
ICICIBANK	2,93,25,327	993.90	2910.19
HDFCBANK	2,79,96,298	1,694.55	4737.48
SBIN	1,85,03,305	609.90	1129.48



Indian equity benchmarks traded mostly in red terrain throughout the day with volatility and ended flat. Investors maintained risk-averse approach ahead of central bank meetings. The Federal Reserve's interest-rate decision is due on Wednesday, followed by the European Central Bank (ECB) on Thursday and the Bank of Japan (BOJ) on Friday. After making a positive start, markets soon turned volatile as investors awaited the Federal Reserve's interest-rate decision for directional cues. Besides, a private report stated that the recent rise in inflation has prompted Indian investors to push back rate cut expectations by at least a quarter to the middle of 2024, with a sustained rise in prices likely to prompt a further repricing. Markets continued to trade near neutral lines in afternoon session despite report that foreign Portfolio Investors (FPIs) have pumped Rs 153,539 crore in India so far in 2023-24 as Indian equity markets continue to attract FPIs. In late afternoon session, markets touched their day's lowest points, but managed to recover from losses to end flat.

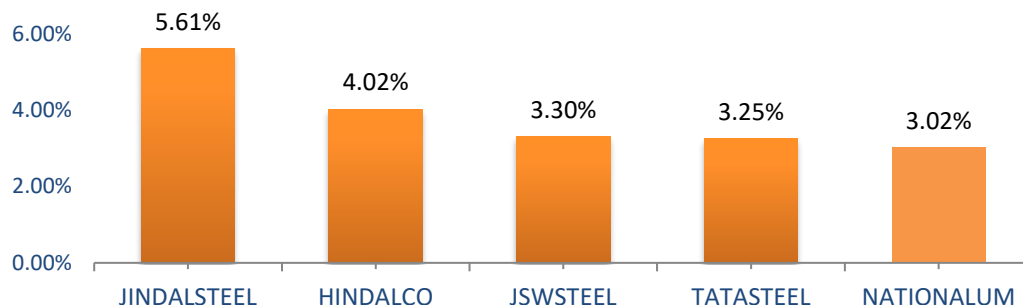
On the global front, European markets were trading higher with miners and luxury stocks in the lead after China pledged more support for its slowing economy, but mixed earnings reports limited further upside in markets. Asian markets ended mostly in green with Chinese and Hong Kong markets posting strong gains after reports emerged that policymakers are looking to bolster growth in the world's second-largest economy.

Source: AceEquity

## NEWS BULLETIN

- **Tata Motors** has reported net profit of Rs 3,300.65 crore for the quarter ended June 30, 2023 as compared to net loss of Rs 4,950.97 crore for the same quarter in the previous year.
- **Sonata Software** has launched Harmoni.AI, a Responsible-first AI offering with a bouquet of Industry solutions, service delivery platforms, and accelerators using generative artificial intelligence (AI). Generative AI is one of the most recent artificial intelligence developments. The trained AI models generate original, human-like content based on massive training datasets and neural network technology.
- **Asian Paints** has reported 52.01% rise in net profit at Rs 1574.84 crore for the quarter ended June 30, 2023 as compared to Rs 1036.03 crore for the same quarter in the previous year.
- **Poonawalla Fincorp** has reported 80.64% rise in net profit at Rs 200.06 crore for the quarter ended June 30, 2023 as compared to Rs 110.75 crore for the same quarter in the previous year.

## MARKET DRIVING SECTOR : METAL



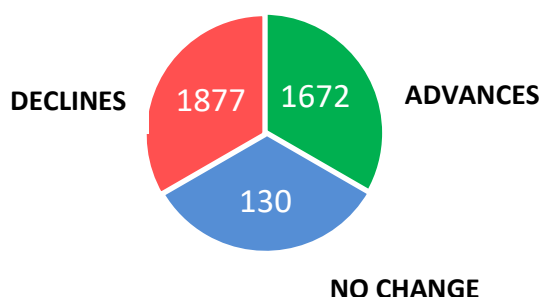
**S&P BSE: METAL**

**CLOSING: 21,671.14**

**CHANGE: +605.74**

**% CHANGE: +2.88%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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