

26 July 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	66,355.71	66,434.72	66,897.27	66,431.34	66,707.21	+351.50	+0.53
NIFTY	19,680.60	19,733.35	19,825.60	19,716.70	19,778.30	+97.70	+0.50

## INDICES BREAK THREE-DAY LOSING STREAK

The 30-share BSE Sensex was up by 351.50 points or 0.53% to settle at 66,707.21 and the Nifty was up by 97.70 points or 0.50% to settle at 19,778.30. The BSE Mid-Cap was up by 0.34% and BSE Small Cap was up by 0.22%. On the sectoral front, Capital Goods, FMCG, Healthcare, IT, Metal, Realty, Bank, and Oil & Gas were the top gaining indices; on the flip side, Auto, and Consumer Durables were the top losing indices. Larsen & Toubro, ITC, Reliance, and Sunpharma were the top gainers on the Sensex; on the flip side, Bajaj Finance, Bajaj Finserv, Mahindra & Mahindra, Asian Paints, and Tech Mahindra were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a red note.

### Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
LT	2,652.00	2,560.90	3.56
CIPLA	1,079.00	1,054.75	2.30
ITC	472.40	462.30	2.18
BRITANNIA	4,980.00	4,885.60	1.93
SUNPHARMA	1,113.50	1,095.05	1.68

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BAJFINANCE	7,474.00	7,606.45	-1.74
BAJAJFINSV	1,626.30	1,648.85	-1.37
M&M	1,545.90	1,565.75	-1.27
APOLLOHOSP	5,147.00	5,212.20	-1.25
TECHM	1,144.00	1,156.50	-1.08

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,23,97,179	1,689.30	2,098.79
TATAMOTOR	3,16,73,714	639.00	2,060.15
BAJFINANCE	22,28,866	7,474.00	1,680.98
RELIANCE	64,55,506	2,526.00	1,630.93
LT	58,20,099	2,652.00	1,545.22

### Most Active (by volume)

Name	Qty	Pr.	Value CR
TATAMOTOR	3,16,73,714	639.00	2060.15
TATASTEEL	2,97,16,336	119.85	356.03
ITC	1,81,43,422	472.40	852.31
NTPC	1,38,57,423	201.85	278.74
ICICIBANK	1,27,80,537	996.15	1270.07



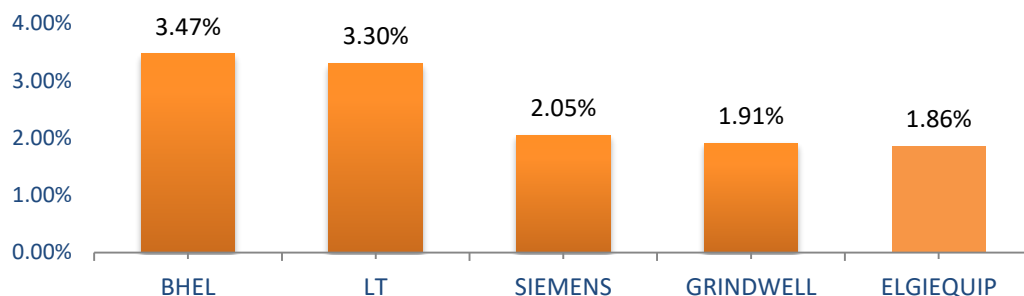
The local equity markets were traded firmly throughout the day and finished the Wednesday's session with gains of over half a percent. Investors were braced for U.S. Federal Reserve interest rate rise later in the day. Also, traders awaited policy decisions from the European Central Bank (ECB) and Bank of Japan (BoJ) this week. Additionally, investors kept close watched on Q1 earnings during the day. Markets made positive start and added more points tracking overnight gains on Wall Street. Traders took support as International Monetary Fund (IMF) raised the FY24 economic growth forecast for India by 20 basis points to 6.1 per cent, citing the country's stronger-than-expected growth momentum in the March quarter of FY23. Indices continued to trade in fine-fettle in afternoon session, as sentiments remained upbeat with minister of state for finance Pankaj Chaudhary's statement that India's general government debt moderated to 80.9% of the Gross Domestic Product (GDP) in 2022-23 from 83.3% in 2021-22. However, markets trim some of their gains in final hour of the trade.

On the global front, European markets were trading lower amid a slew of earnings and ahead of the latest monetary policy update from the U.S. Federal Reserve. Asian markets ended mostly in red after producer prices in Japan were up 1.2 percent on year in June. That missed expectations for an increase of 1.4 percent and was down from the upwardly revised 1.7 percent gain in May (originally 1.6 percent).  
Source: AceEquity

## NEWS BULLETIN

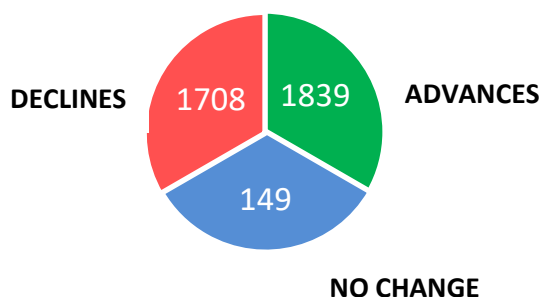
- **Bharat Petroleum Corporation** has reported net profit of Rs 10,644.30 crore for the quarter ended June 30, 2023 as compared net loss of Rs 6,147.94 crore for the same quarter in the previous year.
- **Kajaria Ceramics** has reported 17.37% rise in net profit at Rs 109.11 crore for the quarter ended June 30, 2023 as compared to Rs 92.96 crore for the same quarter in the previous year.
- **Tech Mahindra** has reported 38.68% fall in its net profit at Rs 703.60 crore for the quarter under review as compared to Rs 1147.50 crore for the same quarter in the previous year.
- **Energy Efficiency Services (EESL)**, a joint venture (JV) of four PSUs including NTPC, Power Finance Corporation, Rural Electrification Corporation & Power Grid Corporation, has signed a Rs 110-crore agreement with Andhra Pradesh State Housing Company (APSHCL) to provide energy-efficient appliances to beneficiaries of a government scheme in the state.

## MARKET DRIVING SECTOR : CAPITAL GOODS



**S&P BSE: CAPITAL GOODS**  
**CLOSING: 43,132.88**  
**CHANGE: +673.76**  
**% CHANGE: +1.59%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS

