

31 July 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	66,160.20	66,156.39	66,598.42	65,998.90	66,527.67	+367.47	+0.56
NIFTY	19,646.05	19,666.35	19,772.75	19,597.60	19,753.80	+107.75	+0.55

BOURSES START THE WEEK ON A STRONG NOTE

The 30-share BSE Sensex was up by 367.47 points or 0.56% to settle at 66,527.67 and the Nifty was up by 107.75 points or 0.55% to settle at 19,753.80. The BSE Mid-Cap was up by 0.86% and BSE Small Cap was up by 1.31%. On the sectoral front, Metal, IT, Auto, Bank, Capital Goods, Consumer Durables, Oil & Gas, and Realty were the top gaining indices; on the flip side, FMCG, and Healthcare were the top losing indices. NTPC, Power Grid, Tech Mahindra, and Tata Steel were the top gainers on the Sensex; on the flip side, Bajaj Finance, Kotak Bank, Hindustan Unilever, and ITC 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
NTPC	217.60	210.00	3.62
POWERGRID	266.05	258.20	3.04
ONGC	177.00	171.80	3.03
ADANI PORTS	776.50	755.70	2.75
TECHM	1,119.00	1,091.05	2.56

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
APOLLOHOSP	5,185.00	5,346.95	-3.03
BRITANNIA	4,810.00	4,903.35	-1.90
HDFCLIFE	647.00	659.30	-1.87
BAJFINANCE	7,294.00	7,381.60	-1.19
KOTAKBANK	1,856.90	1,876.85	-1.06

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,72,82,503	1,650.00	2,849.90
ICICIBANK	1,43,03,116	997.00	1,423.49
RELIANCE	42,75,587	2,546.00	1,086.29
INFY	79,02,180	1,354.80	1,067.03
NTPC	4,34,94,779	217.60	940.31

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	5,23,30,311	122.85	642.88
NTPC	4,34,94,779	217.60	940.31
COALINDIA	1,94,22,170	229.35	444.22
POWERGRID	1,82,02,301	266.05	481.03
HDFCBANK	1,72,82,503	1,650.00	2849.90



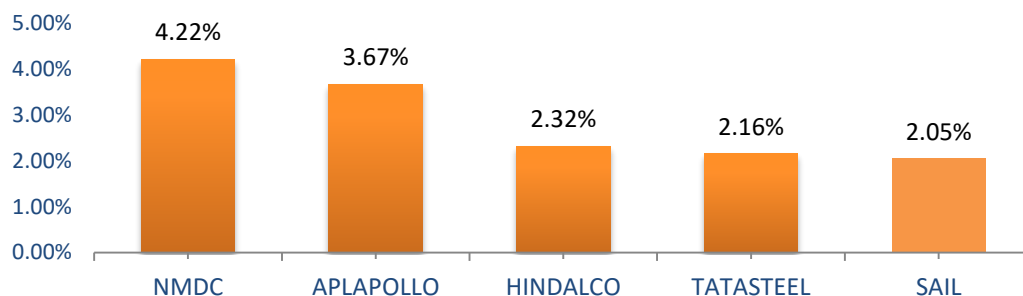
Uptick in last leg of trade helped the Indian markets to close the day's trade near intraday high points. After making cautious start, markets maintained their gains above neutral lines throughout the session. Markets made cautious start, but soon gained strength, as traders took support with Finance minister Nirmala Sitharaman's statement that the government is focusing on four I's - infrastructure, investment, innovation and inclusivity to put in place an enabling ecosystem that will catapult India into the league of developed nations by 2047. Investors ignored that Reserve Bank of India's data showed India's foreign exchange reserves saw a dip of \$1.9 billion, dragging the reserves to \$607.03 billion for the week ending on July 21. Sentiments were positive with a private report that the country's per capita income is likely to grow to \$4,000 by fiscal 2030 from \$2,450 in fiscal 2023, helping it become a middle-income economy with \$6-trillion GDP, more than half of which will be coming in from household consumption. Buying got intensified during final hours of trade to touch day's high points.

On the global front, European markets were trading mostly in green amid the European economy grew modestly in the most recent quarter, breaking out of a months of stagnation or contraction as higher interest rates designed to fight inflation make it more expensive for households and businesses. Asian markets ended mostly in green despite China's factory activity for July remained in contraction territory for the fourth straight month. Source: AceEquity

NEWS BULLETIN

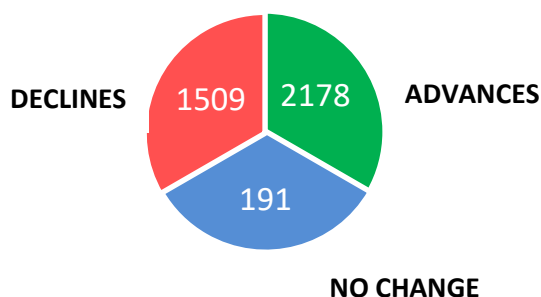
- **GAIL (India)** has reported 44.85% fall in net profit at Rs 1792.99 crore for the first quarter ended June 30, 2023 as compared to Rs 3250.95 crore for the same quarter in the previous year.
- **Sun Pharmaceutical Industries** is eyeing at high single-digit growth in its consolidated topline this fiscal (FY24) on the back of robust performance from all its business verticals. The company also expects expansion of its global specialty business to continue in the ongoing financial year. The company's R&D spending is expected to be 7-8 per cent of sales in FY24 with an increasing share of spending expected on clinical trials for specialty products.
- **Adani Green Energy** has reported 50.93% rise in net profit at Rs 323 crore for the first quarter ended June 30, 2023 as compared to Rs 214 crore for the same quarter in the previous year.
- **Marico** has reported 15.65% rise in net profit at Rs 436 crore for the first quarter ended June 30, 2023 as compared to Rs 377 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : METAL



S&P BSE: METAL
CLOSING: 22,180.72
CHANGE: +376.74
% CHANGE: +1.73%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

