

10 August 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	65,995.81	65,945.39	65,956.25	65,509.14	65,688.18	-307.63	-0.47
NIFTY	19,632.55	19,605.55	19,623.60	19,495.40	19,543.10	-89.45	-0.46

## BOURSES CLOSE IN RED AMID VOLATILITY

The 30-share BSE Sensex was down by 307.63 points or 0.47% to settle at 65,688.18 and the Nifty was down by 89.45 points or 0.46% to settle at 19,543.10. The BSE Mid-Cap was down by 0.09% and BSE Small Cap was down by 0.15%. On the sectoral front, Metal, and Consumer Durables were the top gaining indices; on the flip side, IT, Auto, FMCG, Healthcare, Capital Goods, Realty, and Bank were the top losing indices. IndusInd Bank, JSW Steel, Titan, and Powergrid were the top gainers on the Sensex; on the flip side, Asian Paint, Kotak Mahindra Bank, ITC, and Axis Bank were the top losers on the Sensex. On global front, Asian markets shut the day on a positive note and European indices are trading on green note.

### Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIENT	2,549.00	2,507.10	1.67
ADANIPTS	804.00	791.10	1.63
INDUSINDBK	1,430.00	1,408.45	1.53
TITAN	2,988.00	2,955.90	1.09
ONGC	178.80	176.90	1.07

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ASIANPAINT	3,231.00	3,331.00	-3.00
KOTAKBANK	1,797.30	1,831.50	-1.87
BRITANNIA	4,540.00	4,600.90	-1.32
ITC	452.95	458.65	-1.24
NESTLEIND	21,950.05	22,218.40	-1.21

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	2,53,90,559	1,638.00	4,161.49
TATAMOTOR	5,31,16,980	617.50	3,215.86
ICICIBANK	2,48,58,441	963.35	2,399.34
ADANIENT	81,40,756	2,549.00	2,075.51
RELIANCE	77,35,299	2,536.00	1,959.53

### Most Active (by volume)

Name	Qty	Pr.	Value CR
TATAMOTOR	5,31,16,980	617.50	3215.86
SBIN	2,73,25,801	574.00	1566.64
HDFCBANK	2,53,90,559	1,638.00	4161.49
ICICIBANK	2,48,58,441	963.35	2399.34
TATASTEEL	2,44,39,101	120.00	293.05



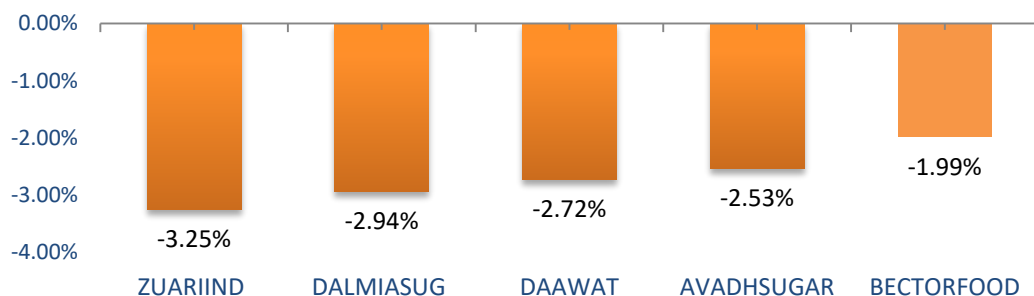
Indian equity benchmarks ended lower after the Reserve Bank of India (RBI) announced the status quo on the benchmark lending rate as well as its policy stance at its monetary policy committee (MPC) meeting. Markets witnessed volatility during the day amid weekly F&O expiry. Indices traded under pressure entire day as investors maintained risk-averse approach. Further, markets fell sharply lower as the RBI's Monetary Policy Committee projected real gross domestic product (GDP) growth for 2023-24 at 6.5 per cent with Q1 at 8.0 per cent; Q2 at 6.5 per cent; Q3 at 6.0 per cent; and Q4 at 5.7 per cent, with risks broadly balanced. Real GDP growth for Q1:2024-25 is projected at 6.6 per cent. Further, the RBI has projected July-September quarter retail inflation at 6.2 per cent. This has been driven by a spike in prices of certain vegetables. Markets made negative start tracing weak cues from Asian markets. the Society of Indian Automobile Manufacturers (SIAM) in its latest report has showed that domestic passenger vehicles wholesales registered a 2.94 per cent year-on-year growth at 3,02,521 units in the month of July 2023, as against 2,93,865 units in July 2022.

On the global front, European markets were trading mostly in green with the latest batch of corporate earnings and upcoming U.S. inflation data in focus. Asian markets ended mostly in green as China deflation worries persisted and caution crept in ahead of U.S. consumer price inflation data due later in the day that might offer clues to the Federal Reserve's policy path. Source: AceEquity

## NEWS BULLETIN

- **NCC** has reported 34.08% rise in its net profit at Rs 184.22 crore for the first quarter ended June 30, 2023 as compared to Rs 137.40 crore for the same quarter in the previous year.
- **Hindalco Industries** and **Texmaco Rail & Engineering** have entered into a strategic alliance to develop and manufacture world-class aluminium rail wagons and coaches that will help Indian Railways achieve its emission goals and bolster operating efficiency. Hindalco's in-house aluminium freight rake is 180 tons lighter and offers 19% higher payload to tare weight ratio, consumes less energy with relatively negligible wear and tear. Temaco will be responsible for design, setting up the factory, production line and providing skilled workers
- **Grasim Indu** has reported 6.61% fall in net profit at Rs 2,576.35 crore for the first quarter ended June 30, 2023 as compared to Rs 2,758.75 crore for the same quarter in the previous year.
- **3M India** has reported 53.35% rise in its net profit at Rs 129.21 crore for the first quarter ended June 30, 2023 as compared to Rs 84.26 crore for the same quarter in the previous year.

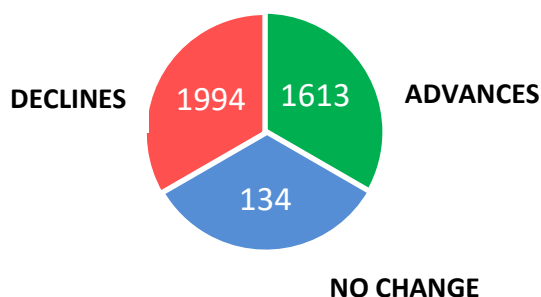
## MARKET DRIVING SECTOR : FMCG



**S&P BSE: FMCG**  
**CLOSING: 18,674.82**  
**CHANGE: -166.22**  
**% CHANGE: -0.88%**

0.7

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS

