

14 August 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	65,322.65	65,153.02	65,517.82	64,821.88	65,401.92	+79.27	+0.12
NIFTY	19,428.30	19,383.95	19,465.85	19,257.90	19,434.55	+6.25	+0.03

INDICES RECOVER FROM DAY LOWS TO CLOSE IN GREEN

The 30-share BSE Sensex was up by 79.27 points or 0.12% to settle at 65,401.92 and the Nifty was up by 6.25 points or 0.03% to settle at 19,434.55. The BSE Mid-Cap was down by 0.44% and BSE Small Cap was down by 0.50%. On the sectoral front, IT, and FMCG were the top gaining indices; on the flip side, Metal, Consumer Durables, Auto, Healthcare, Capital Goods, Realty, Oil & Gas, and Bank were the top losing indices. Reliance, Infosys, Hindustan Unilever, and Larsen & Toubro were the top gainers on the Sensex; on the flip side, JSW Steel, State Bank of India, Tata Steel, and Bajaj Finserv were the top losers on the Sensex. On global front, Asian markets shut the day on a negative note and European indices are trading on green note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
DIVISLAB	3,744.80	3,679.15	1.78
INFY	1,392.95	1,371.85	1.54
LTIM	5,182.00	5,107.35	1.46
HINDUNILVR	2,532.95	2,501.80	1.25
RELIANCE	2,573.20	2,547.15	1.02

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIEN	2,446.95	2,539.50	-3.64
JSWSTEEL	798.15	820.65	-2.74
HINDALCO	448.85	462.45	-2.31
SBIN	561.00	574.15	-2.29
ADANIPTS	784.00	801.05	-2.13

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,56,52,205	1,608.50	2,518.38
ADANIEN	97,86,919	2,446.95	2,398.23
ICICIBANK	1,90,26,691	959.00	1,819.69
SBIN	2,80,84,093	561.00	1,576.75
ADANIPTS	1,78,41,454	784.00	1,396.50

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	3,30,95,516	117.85	391.26
SBIN	2,80,84,093	561.00	1576.75
ICICIBANK	1,90,26,691	959.00	1819.69
ADANIPTS	1,78,41,454	784.00	1396.50
HDFCBANK	1,56,52,205	1,608.50	2518.38



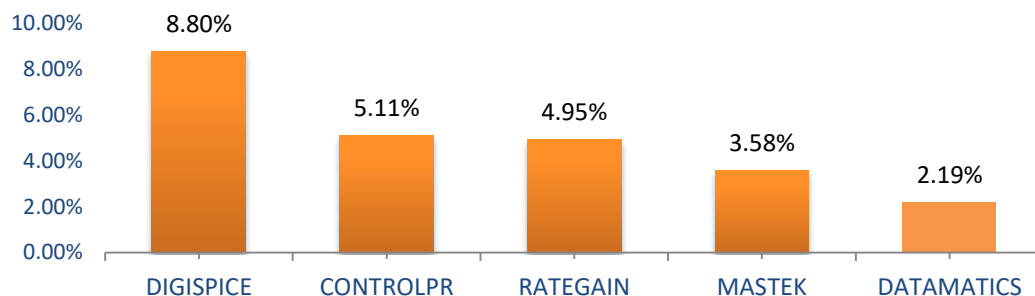
After spending most part of day in red zone, Indian equity benchmarks ended flat with positive bias on first trading day of week. In last leg of trade, markets showed recovery and turned into green. Traders continued to track important macroeconomic data. Investors were cautious ahead of the retail inflation data to be out later in the day. Markets made negative start and extended their losses, as growth in the index of industrial production (IIP) cooled to a three-month low of 3.7 per cent in June from 5.2 per cent in May, on the back of a high base effect and slowdown in manufacturing output. Traders overlooked report that net direct tax collections swelled 17.33 per cent to Rs 5.84 lakh crore so far this fiscal, reaching 32 per cent of the full-year budget estimates (BE). Traders took note of report that India's inflation based on wholesale price index (WPI) deflated for the fourth straight month in July at (-) 1.36% due to fall in the prices of Minerals, Mineral oils, and Electricity. Further, indices wiped out all their losses and ended the day's trade on flat note. Meanwhile, India's merchandise trade deficit in July stood at \$20.67 billion. Merchandise exports stood at \$32.25 billion, while imports were \$52.92 billion in July. In the previous month, merchandise exports were \$32.97 billion, while imports stood at \$53.10 billion.

On the global front, European markets were trading mostly in green. Asian markets ended mostly in red after fall in US tech stocks and as concerns over China's property sector weighed on sentiment.
Source: AceEquity

NEWS BULLETIN

- **DroneAcharya Aerial Innovations** has entered into a Memorandum of Understanding (MoU) with Mariano Marcos State University (MMSU) with the mission of development of virtuous human capital and sustainable innovations. The major purpose of the MoU is to provide drone pilot training and drone data processing training to the Local Government Units (LGU) of Philippines.
- **Tata Consultancy Services (TCS)** has been selected as a strategic partner by Lexmark, a global imaging and IoT solutions provider, to transform its enterprise applications, accelerate its cloud journey and scale up its innovation program.
- **Divi's Laboratories** has reported 49.29% fall in its net profit at Rs 356 crore for the first quarter ended June 30, 2023 as compared to Rs 702 crore for the same quarter in the previous year.
- **State Bank of India** is aiming for 1 lakh Customer Service Points across the country by end of FY24. The bank is poised to improve the entire Financial Inclusion ecosystem through enhanced product bouquet by extending doorstep banking by way of handheld devices and introducing IRIS scan utility.

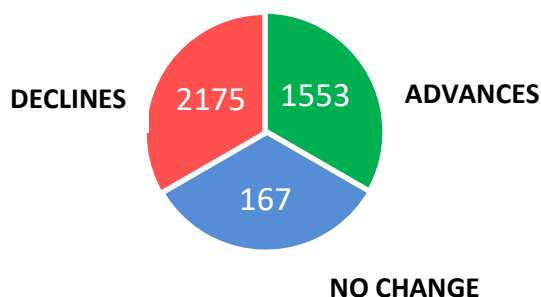
MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 31,218.63
CHANGE: +199.29
% CHANGE: +0.64%

0.7

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

