

24th August 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	65,433.30	65,722.51	65,913.77	65,181.94	65,252.34	-180.96	-0.28
NIFTY	19,444.00	19,535.15	19,584.45	19,369.00	19,386.70	-57.30	-0.29

INDICES WIPE OUT ALL INTRADAY GAINS

The 30-share BSE Sensex was down by 180.96 points or 0.28% to settle at 65,252.34 and the Nifty was down by 57.30 points or 0.29% to settle at 19,386.70. The BSE Mid-Cap was up by 0.11% and BSE Small Cap was up by 0.21%. On the sectoral front, IT, Banking, Realty and FMCG were the top gaining indices; on the flip side, Healthcare, Capital Goods, Metal, Consumer Durable, Oil & Gas and Auto were the top losing indices. Asian Paint, Infosys, Ultratech Cement and Nestle were the top gainers on the Sensex; on the flip side Jio Finance, Reliance, Powergrid and JSW Steel were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are also trading on a positive note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
BPCL	351.45	344.80	1.93
ASIANPAINT	3,225.20	3,168.80	1.78
INDUSINDBK	1,418.65	1,401.00	1.26
INFY	1,424.00	1,407.95	1.14
BRITANNIA	4,555.00	4,512.45	0.94

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
JIOFIN	213.45	224.65	-4.99
RELIANCE	2,475.80	2,522.20	-1.84
DIVISLAB	3,648.00	3,704.15	-1.52
POWERGRID	246.30	249.60	-1.32
ONGC	173.20	175.50	-1.31

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	2,15,72,896	1,579.60	3,416.26
ICICIBANK	2,83,89,740	968.80	2,761.19
RELIANCE	70,70,010	2,475.80	1,771.22
SBIN	2,41,31,644	577.00	1,394.78
ADANI	45,58,367	2,542.20	1,173.70

Most Active (by volume)

Name	Qty	Pr.	Value CR
ICICIBANK	2,83,89,740	968.80	2761.19
JIOFIN	2,76,73,356	213.45	590.69
TATASTEEL	2,71,03,446	118.30	321.99
SBIN	2,41,31,644	577.00	1394.78
HDFCBANK	2,15,72,896	1,579.60	3416.26



Indian share markets failed to maintain early gains till the end and ended near day's low levels as investors preferred to sell their riskier assets. However, markets ended with limited losses amid weekly F&O expiry. Initially, soft landing of Chandrayaan-3 offered some support to the markets. Successful soft landing on the lunar surface, making the country the first one to land on the south polar region (dark side) of the Moon. Buying were witnessed in IT and banking stocks, while selling were seen in Metal stocks. The broader indices, the BSE Mid cap index and Small cap index ended in green. Indices made optimistic start and extended their gains to trade higher following broadly positive cues from global peers. Some support came after RBI Governor Shaktikanta Das said that vegetable rates may ease from September, led by tomato prices, which have started showing signs of correction on the back of increased supply. Foreign fund inflows also boosted investors sentiments.

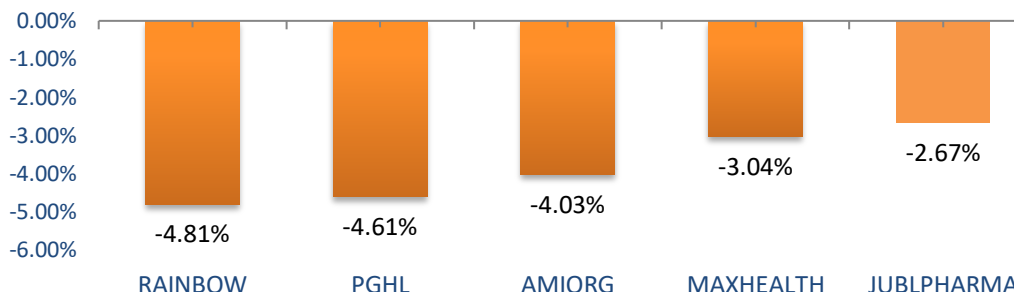
On the global front, European markets were trading higher as bond yields retreated globally amid hopes that interest rates may have peaked. Blockbuster earnings and bullish outlook from Nvidia also offered some support as investors looked ahead to the Federal Reserve's upcoming Jackson Hole symposium. Asian markets ended mostly in green after Singapore's consumer price inflation moderated further in July to the lowest level in more than one and-a-half years, primarily due to lower charges for private transport.

Source: AceEquity

NEWS BULLETIN

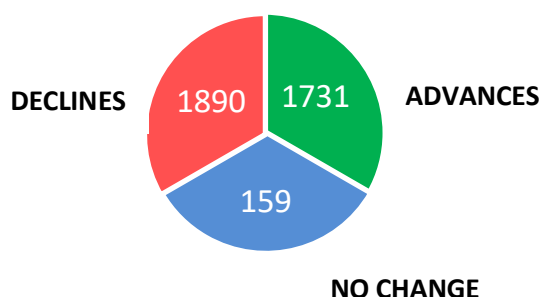
- **Tube Investments of India's** subsidiary -- M/s. TI Clean Mobility (TICMPL) has completed acquiring 64,17,278 equity shares of the face value of Rs 10 each, representing 50% of the subscribed and paid up equity share capital of Jayem Automotives (Jayem).
- **Spandana Spahoorty Financial** has raised Rs 50 crore through allotment of 5000 Senior, Secured, Rated, Listed, Redeemable, Non-Convertible Debentures (NCDs) having face value of Rs 1,00,000 on a private placement basis in demat form.
- **RailTel Corporation of India** has received the work order from Kerala State Information Technology Infrastructure for supply, installation, testing, commissioning and maintenance of ISP Hardware, Software and License for Kerala Fibre Optic Network (KFON) amounting to Rs 27.91 crore (excluding GST). The project completion period is 90 days.
- **Datamatics Global Services** has collaborated with the Memphis Area Transit Authority (MATA) to launch GO901 Smart Card System. This innovative system, launched on August 21, 2023.

MARKET DRIVING SECTOR : HEALTHCARE

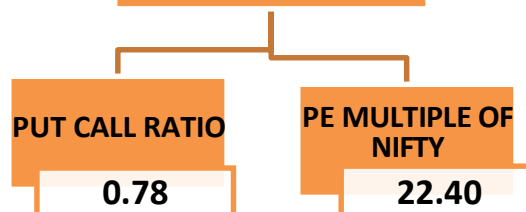


S&P BSE: HEALTHCARE
CLOSING: 27,898.38
CHANGE: -201.13
% CHANGE: -0.72%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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