

25th August 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	65,252.34	65,000.67	65,106.00	64,732.57	64,886.51	-365.83	-0.56
NIFTY	19,386.70	19,297.40	19,339.55	19,229.70	19,265.80	-120.90	-0.62

BACK TO BACK WINS FOR BEARS

The 30-share BSE Sensex was down by 365.83 points or 0.56% to settle at 64,886.51 and the Nifty was down by 120.90 points or 0.62% to settle at 19,265.80. The BSE Mid-Cap was down by 0.85% and BSE Small Cap was down by 0.24%. On the sectoral front, there was no gaining index; on the flip side, Capital Goods, IT, Banking, Realty, FMCG, Healthcare, Metal, Consumer Durable, Oil & Gas and Auto were the top losing indices. Bajaj Finance, Asian paint, Bharti Airtel and Titan were the top gainers on the Sensex; on the flip side IndusInd Bank, JSW Steel, Larsen & Toubro and Ultratech Cement 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 positive note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
JIOFIN	221.60	213.45	3.82
BAJAJFINSV	1,504.00	1,468.60	2.41
ASIANPAINT	3,255.85	3,225.60	0.94
BAJFINANCE	7,185.15	7,137.45	0.67
ONGC	174.25	173.10	0.66

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
LT	2,632.00	2,688.15	-2.09
DRREDDY	5,785.00	5,907.15	-2.07
JSWSTEEL	772.00	787.90	-2.02
ADANI PORTS	806.00	822.35	-1.99
ADANI ENT	2,490.00	2,539.55	-1.95

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
JIOFIN	28,10,40,185	221.60	5,848.45
RELIANCE	1,11,11,200	2,461.90	2,750.37
HDFCBANK	1,50,34,878	1,559.20	2,352.84
ICICIBANK	1,02,75,758	969.85	995.20
TATAMOTOR	1,60,75,509	601.80	974.29

Most Active (by volume)

Name	Qty	Pr.	Value CR
JIOFIN	28,10,40,185	221.60	5,848.4
TATASTEEL	2,36,92,527	117.10	278.10
TATAMOTOR	1,60,75,509	601.80	974.29
HDFCBANK	1,50,34,878	1,559.20	2,352.8
SBIN	1,22,71,885	569.70	700.96



Following mostly weak cues from other Asian markets, Indian share markets concluded the last trading day of week with cut of over half a percent ahead of US Fed Chair Jerome Powell's speech at the Jackson Hole Symposium later in the day. He is expected to outline whether interest rates should continue to rise to combat high inflation. Besides, Reserve Bank of India's (RBI) MPC minutes dampened investors sentiments. Sector wise, Metal stocks witnessed heavy selling pressure during the day. As for broader indices, the BSE Mid cap index ended with cut of over half a percent, while Small cap index ended with marginal losses. Markets made gap-down opening and added more losses as traders were worried after the Reserve Bank of India (RBI) minutes showed that Monetary Policy Committee (MPC) member Jayanth R Varma said the inflation readings for the next couple of months are likely to remain well above the Reserve Bank of India's (RBI) tolerance band of 2-6 per cent.

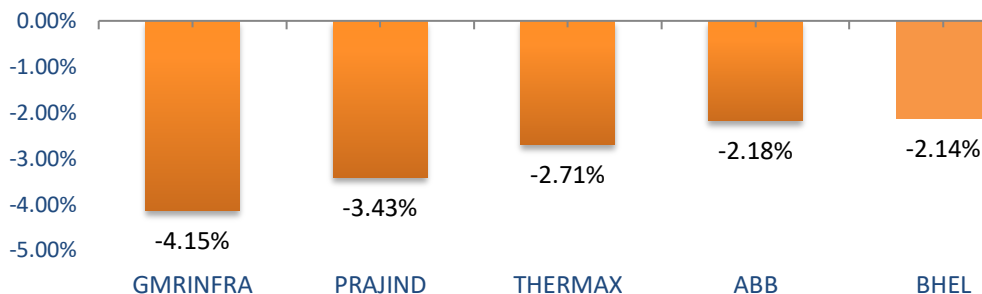
On the global front, European markets were trading higher as investors awaited speeches from central bankers, including Federal Reserve Chair Jerome Powell at the Jackson Hole symposium for fresh clues on the outlook for interest rates. Asian markets ended mostly in red. Back home, Commerce and Industry Minister Piyush Goyal has said the ongoing negotiations between India and the UK on a free trade agreement (FTA) are progressing 'extremely well' and it is expected to conclude at an early date. Goyal said both sides are confident that they will come out with a very balanced.

Source: AceEquity

NEWS BULLETIN

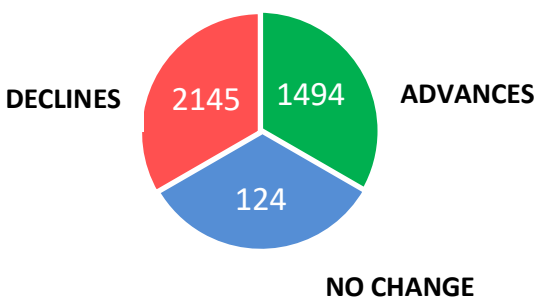
- **RIL telecom arm -- Reliance Jio Infocomm (Jio)** has added 22.72 lakh customers in June 2023. Following this, the company's total customer base has increased to 43.85 crore with market share of 38.35% in terms of wireless subscribers as on June 30, 2023.
- **Vodafone Idea** has lost 12.85 lakh customers in June 2023. Following this, the company's total customer base has decreased to 22.96 crore with market share of 20.08% in terms of wireless subscribers as on June 30, 2023.
- **Indian Oil Corporation (IOC)** is planning to invest over Rs 4 lakh crore in this decade to expand oil refining and petrochemical business as well as in energy transition projects as part of a plan to become a '360-degree energy company'.
- **Suzlon Group** has won significantly large new order acquisition for its 3 MW series of wind turbines from Teq Green Power XI, part of O2 Power. Suzlon will install 64 of its largest wind turbine generators (WTGs) with a Hybrid Lattice Tubular (HLT) tower and a rated capacity of 3.15 MW each for the 201.6 MW wind power project.

MARKET DRIVING SECTOR : CAPITAL GOODS

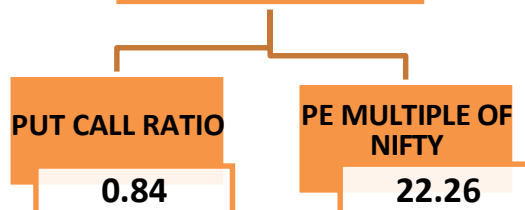


S&P BSE: CAPITAL GOODS
CLOSING: 43,991.70
CHANGE: -573.73
% CHANGE: -1.29%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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