

28th August 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	64,886.51	64,908.08	65,213.45	64,776.92	64,996.60	+110.09	+0.17
NIFTY	19,265.80	19,298.35	19,366.85	19,249.70	19,306.05	+40.25	+0.21

## INDICES TRIM INTRADAY GAINS IN LAST HOUR OF TRADE

The 30-share BSE Sensex was up by 110.09 points or 0.17% to settle at 64,996.60 and the Nifty was up by 40.25 points or 0.21% to settle at 19,306.05. The BSE Mid-Cap was up by 0.59% and BSE Small Cap was up by 0.67%. On the sectoral front, Capital Goods, Banking, Realty, Metal, Healthcare, Consumer Durable, Auto and Oil & Gas were the top gaining index; on the flip side, IT and FMCG were the top losing indices. Larsen & Toubro, Mahindra & Mahindra, HDFC Bank and Maruti were the top gainers on the Sensex; on the flip side Reliance, Nestle, HCL Tech and Titan Cement were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices also are trading on a positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
POWERGRID	248.70	242.00	2.77
LT	2,694.00	2,638.40	2.11
CIPLA	1,232.95	1,209.40	1.95
M&M	1,547.80	1,520.05	1.83
BPCL	355.60	350.25	1.53

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
JIOFIN	210.10	214.50	-2.05
RELIANCE	2,436.95	2,468.35	-1.27
HINDALCO	446.10	450.00	-0.87
ADANIANT	2,473.95	2,495.75	-0.87
NESTLEIND	22,005.75	22,188.50	-0.82

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,44,33,619	1,578.00	2,272.46
JIOFIN	8,75,22,126	210.10	1,891.62
RELIANCE	62,90,413	2,436.95	1,550.82
ADANIANT	44,57,038	2,473.95	1,114.23
ICICIBANK	1,04,81,574	971.40	1,016.89

Most Active (by volume)			
Name	Qty	Pr.	Value CR
JIOFIN	8,75,22,126	210.10	1891.62
TATASTEEL	1,92,18,821	117.55	226.17
HDFCBANK	1,44,33,619	1,578.00	2272.46
ICICIBANK	1,04,81,574	971.40	1016.89
SBIN	97,11,932	573.10	555.37



The domestic markets joined global markets run and concluded first trading day of week in green zone. However, markets traded with limited gains throughout the day, as investors maintained risk-averse approach due to weak foreign exchange reserve and FDI data. Traders were seen piling up positions in Banking, and Metal sectors while selling was witnessed in IT sector stocks. As for broader indices, the BSE Mid cap index and Small cap index ended with gains of over half a percent each. After making positive start, markets turned volatile for little time, as traders were worried after Reserve Bank of India (RBI) in its latest data has said India's foreign exchange reserve fell by \$7.3 billion to a near two-month low of \$595 billion in the week ended August 18, registering the most substantial weekly decline in over six months. However, further markets gained some strength, as investors found support with Finance Minister Nirmala Sitharaman's statement that India's GDP growth in the first quarter of this fiscal (Q1FY24) should be good.

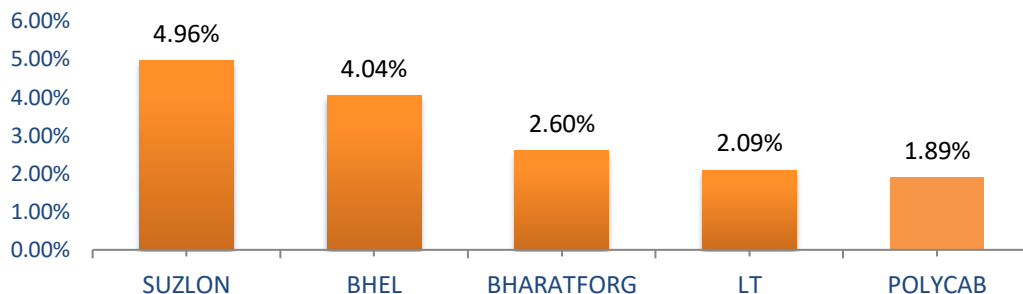
On the global front, European markets were trading higher amid hopes that U.S. rate hikes are nearing an end. Asian markets ended mostly higher as investors cheered China's stimulus to ease market unrest and drive economic growth. Chinese authorities announced a slew of measures over the weekend to bolster the country's equity markets and fuel an increase in spending. Finance Minister said Jan Dhan Yojana-led interventions and digital transformation have revolutionised financial inclusion in the country

Source: AceEquity

## NEWS BULLETIN

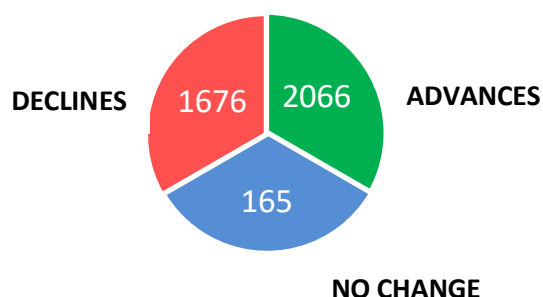
- **Kajaria Ceramics** has received approval to increase limits of investment in Kajaria International DMCC (U.A.E.) (Kajaria International), a wholly-owned subsidiary company, from Rs 5 crore to Rs 15 crore, in one or more tranches, through subscription of shares of Kajaria International and/or granting of unsecured loan to Kajaria International, subject to compliance of applicable laws.
- **REC** has entered into a pact with Damodar Valley Corporation (DVC), under which REC will provide a loan of Rs 4,527.68 crore to DVC for setting up a 1,320 MW thermal power project (2x660 MW) at Raghunathpur in West Bengal.
- **Schaeffler India's** Board of Directors has approved the acquisition of 100% of the shares of KRSV Innovative Auto Solutions (Koovers), a Bengaluru-based private limited company offering spare parts solutions to Indian aftermarket workshops via a B-to-B e-commerce platform. This acquisition presents an ideal synergy for Schaeffler's future aftersales activities in India

## MARKET DRIVING SECTOR : CAPITAL GOODS

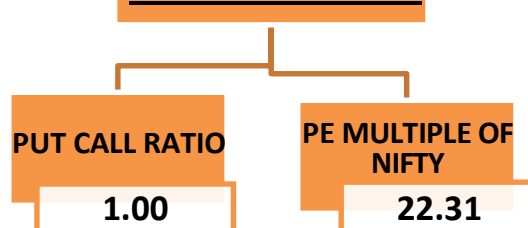


**S&P BSE: CAPITAL GOODS**  
**CLOSING: 44,593.16**  
**CHANGE: +601.46**  
**% CHANGE: 1.37%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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