

31st August 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	65,087.25	65,178.33	65,277.04	64,723.63	64,831.41	-255.84	-0.39
NIFTY	19,347.45	19,375.55	19,388.20	19,223.65	19,253.80	-93.65	-0.48

INDICES SHUT THE DAY ON A RED NOTE

The 30-share BSE Sensex was down by 255.84 points or 0.39% to settle at 64,831.41 and the Nifty was down by 93.65 points or 0.48% to settle at 19,253.80. The BSE Mid-Cap was down by 0.02% and BSE Small Cap was up by 0.79%. On the sectoral front, Realty, Metal, Capital Goods, IT, Consumer Durable, and Healthcare were the top gaining index; on the flip side, Oil & Gas, FMCG Auto and Banking were the top losing indices. Maruti, Titan, Ultratech Cement and Tata Steel were the top gainers on the Sensex; on the flip side Asian Paint, IndusInd Bank, SBIN and Hindustan Unilever were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices also are trading on a negative note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
JIOFIN	240.00	231.25	3.78
MARUTI	10,000.00	9,796.40	2.08
HDFCLIFE	646.05	637.05	1.41
CIPLA	1,253.40	1,236.15	1.40
TATASTEEL	123.60	122.10	1.23

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIENT	2,425.00	2,513.10	-3.51
BPCL	340.30	351.95	-3.31
ADANI PORTS	792.70	818.70	-3.18
BRITANNIA	4,460.00	4,550.80	-2.00
EICHERMOT	3,341.00	3,405.75	-1.90

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	5,00,37,886	1,577.00	7,860.85
ICICIBANK	3,66,75,400	959.85	3,517.46
JIOFIN	12,41,21,679	240.00	2,951.74
RELIANCE	1,08,19,300	2,408.00	2,607.70
AXISBANK	2,15,57,826	971.50	2,108.29

Most Active (by volume)

Name	Qty	Pr.	Value CR
JIOFIN	12,41,21,679	240.00	2951.74
TATASTEEL	6,06,26,959	123.60	744.32
HDFCBANK	5,00,37,886	1,577.00	7860.85
ICICIBANK	3,66,75,400	959.85	3517.46
SBIN	2,78,98,476	562.15	1574.65



Indian equity benchmarks ended in red on Thursday ahead of India's Q1 Gross Domestic Product (GDP) data to be out later in the day and amid August F&O expiry. Besides, selling in Adani group stocks dampened sentiments in markets after the non-profit Organized Crime and Corruption Reporting Project (OCCRP) released new details on allegations that the Adani Family partners had invested millions to buy own group shares through opaque investment funds based in the island nation of Mauritius. Sector wise, heavy selling pressure was witnessed in Oil & Gas sector stocks. Indices failed to hold onto their gains and slipped in red terrain as foreign fund outflows dampened investors sentiments. Traders were cautious as CareEdge Ratings in its latest report said the India's rural demand is vulnerable and could be further impacted by the 'dual blows' of lower income and high food inflation owing to an erratic monsoon. Investors ignored FM Nirmala Sitharaman's statement that Indian inflation will remain steady in coming months, despite short-term, despite short-term rises in the prices of certain food items.

On the global front, European markets were trading mostly in red amid China's manufacturing activity fell for a fifth consecutive month in August, but the PMI rose to 49.7 - beating forecasts and showing improvement from the July reading. Asian markets ended mostly in red after Japanese factory activity and Chinese service industry growth weakened.

Source: AceEquity

NEWS BULLETIN

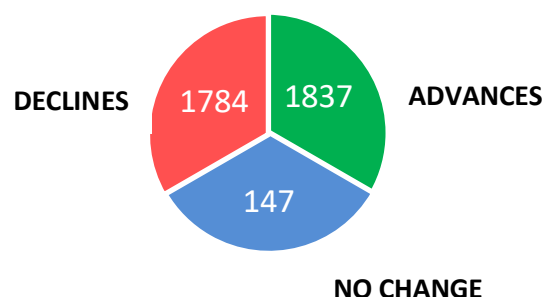
- **Ashok Leyland** has partnered with CSB Bank for offering vehicle financing solutions to its customers. The two companies have signed a Memorandum of Understanding and the partnership will enable them to offer customised financial solutions to the automaker's customers.
- **InterGlobe Aviation (IndiGo)** has launched daily direct connectivity between Delhi and Belagavi (also known as Belgaum/ Belgaon), effective October 05, 2023. This newly established route will fortify point-to-point connectivity and elevate connectivity between northern and southern India. As the oldest airport in the north of Karnataka, Belagavi Airport represents a notable stride in strengthening regional connectivity and providing options for both business and leisure travelers.
- **Nestle India** has launched Nestle a+ Masala Millet that contains bajra and can be eaten as a light meal at any time of the day. Available in two lip smacking variants, Tangy Tomato and Veggie Masala, Nestle a+ Masala Millet comes in a multi-serve pack priced at Rs 175 for 240 gm and a single-serve pack priced at Rs 30 for 40 gm.

MARKET DRIVING SECTOR : OIL & GAS

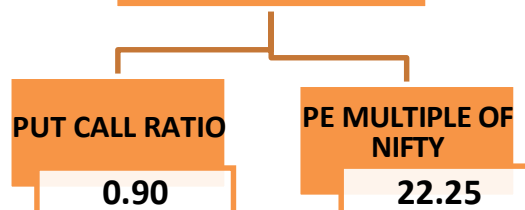


S&P BSE: OIL & GAS
CLOSING: 18,446.17
CHANGE: -247.14
% CHANGE: -1.32%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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