

13 September 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	67,221.13	67,188.64	67,565.41	67,053.36	67,466.99	+245.86	+0.37
NIFTY	19,993.20	19,989.50	20,096.90	19,944.10	20,070.00	+76.80	+0.38

## INDICES PULL BACK FROM LOWER LEVELS

The 30-share BSE Sensex was up by 245.86 points or 0.37% to settle at 67,466.99 and the Nifty was up by 76.80 points or 0.38% to settle at 20,070.00. The BSE Mid-Cap was up by 0.19% and BSE Small Cap was up by 0.85%. On the sectoral front, Consumer Durable, Oil & Gas, Metal, FMCG, Healthcare, Realty and Banking were the top gaining indices; on the flip side IT, Auto, and Capital Goods were the losing indices. Bharti Airtel, Titan, IndusInd Bank and Axis Bank were the top gainers on the Sensex; on the flip side, Mahindra & Mahindra, Larsen & Toubro, Nestle India and JSW Steel 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
COALINDIA	279.45	270.75	3.21
GRASIM	1,929.50	1,870.95	3.13
TATACONSUM	890.00	864.75	2.92
BHARTIARTL	914.95	890.40	2.76
TITAN	3,261.00	3,185.80	2.36

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HDFCLIFE	651.25	660.95	-1.47
M&M	1,536.65	1,557.95	-1.37
ADANI PORTS	847.35	858.75	-1.33
LT	2,912.00	2,944.10	-1.09
CIPLA	1,226.85	1,239.80	-1.04

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	2,32,10,047	1,641.60	3,815.15
ICICIBANK	2,19,97,553	989.95	2,174.19
RELIANCE	64,01,669	2,450.10	1,569.55
AXISBANK	1,22,54,423	1,016.75	1,236.96
SBIN	1,93,77,172	596.35	1,147.59

### Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	2,33,71,459	129.90	302.24
HDFCBANK	2,32,10,047	1,641.60	3815.15
ICICIBANK	2,19,97,553	989.95	2174.19
SBIN	1,93,77,172	596.35	1147.59
COALINDIA	1,76,07,568	279.45	488.15



Local equity markets concluded Wednesday's trade in green with Nifty and Sensex settling above the psychological 20,050 and 67,400 levels, respectively. Markets spent most part of their time in green territory as ease in retail inflation and a rise in industrial output boosted investors' sentiments. Now, traders turned their focus towards the Wholesale Price Index (WPI) data, which scheduled to be release on September 14. Sector wise, banking stocks were on the priority list of the buyers. The broader indices, the BSE Mid cap index and Small cap index ended in green. Indices made cautious start and turned volatile tracking overnight losses on Wall Street as well as sell-off in the Asian counterparts, as traders remained cautious ahead of the release of a key US inflation data later in the day that could influence the outlook for interest rates. But, losses were limited as retail inflation based on the Consumer Price Index (CPI) declined to 6.83 per cent in August 2023 mainly due to softening prices of vegetables. India's industrial production measured (IIP) jumped to 5.7 per cent in July 2023 from 3.7 per cent in June 2023.

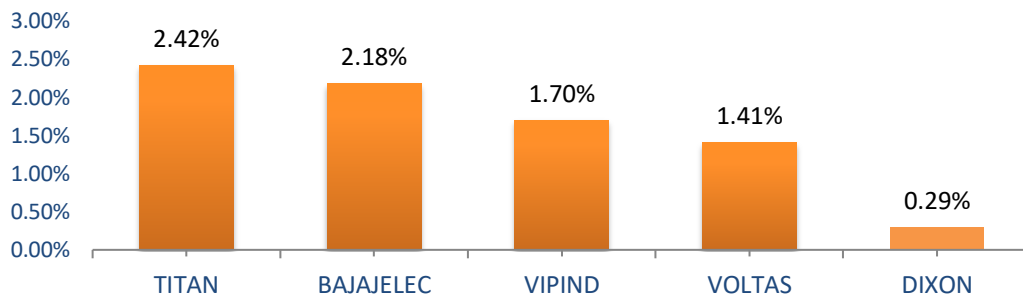
On the global front, European markets were trading lower after data showed Eurozone industrial production fell more than expected in July. Industrial output fell 1.1 percent month-on-month, the Eurostat said in its latest release, versus -0.7 percent expected and a 0.4 percent increase reported in June. Asian markets ended mixed as investors braced for key U.S. inflation data due later in the day that could influence rate hike expectations.

Source: AceEquity

## NEWS BULLETIN

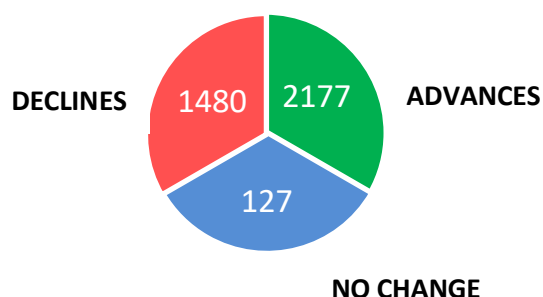
- **Kewal Kiran Clothing (KKCL)** is all set to launch a new product segment to be called 'Junior Killer' for kids apparel and lifestyle accessories. The company will introduce the product range for Spring Summer 24 collection to its channel partners on September 24, 2023.
- **Tata Steel** has inaugurated a fully automated construction service centre in Uttar Pradesh to manufacture reinforced products. The centre in Ghaziabad, which is the company's second such unit after Cuttack in Odisha, will also provide solutions to the construction industry.
- **Avantel** has received a supply order worth of Rs 7.03 crore from Material Organisation, Visakhapatnam. The order for Supply of MSS TX - RX Terminals M-II is to be executed by September 10, 2024.
- **Zydus Lifesciences** has received the Establishment Inspection Report (EIR) from the United States Food and Drug Administration (USFDA) for the inspection conducted at the injectable manufacturing facility at Zydus Biotech Park located at Changodar, Ahmedabad from June 5 to 13, 2023.

## MARKET DRIVING SECTOR : CONSUMER DURABLES

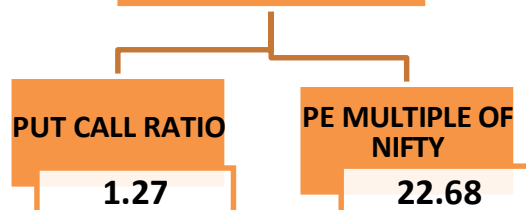


**S&P BSE: CONSUMER DURABLES**  
**CLOSING: 46,072.30**  
**CHANGE: +562.19**  
**% CHANGE: +1.24%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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