

22 September 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	66,230.24	66,215.04	66,445.47	65,952.83	66,009.15	-221.09	-0.33
NIFTY	19,742.35	19,744.85	19,798.65	19,657.50	19,674.25	-68.10	-0.34

NO COME BACK FOR BULLS

The 30-share BSE Sensex was down by 221.09 points or 0.33% to settle at 66,009.15 and the Nifty was down by 68.10 points or 0.34% to settle at 19,674.25. The BSE Mid-Cap was down by 0.14% and BSE Small Cap was up by 0.04%. On the sectoral front, Banking, Auto and Capital Goods were gaining indices; on the flip side, Healthcare, Metal, Consumer Durable, Oil & Gas, FMCG, Realty, and IT were the top losing indices. IndusInd Bank, Maruti, SBIN and Mahindra & Mahindra were the top gainers on the Sensex; on the flip side, Wipro, HDFC Bank, Ultratech Cement and Powergrid 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 negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
INDUSINDBK	1,451.65	1,411.30	2.86
MARUTI	10,552.60	10,284.30	2.61
SBIN	598.70	588.15	1.79
M&M	1,610.00	1,583.25	1.69
ASIANPAINT	3,280.50	3,244.20	1.12

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
WIPRO	418.50	428.95	-2.44
DRREDDY	5,537.00	5,668.50	-2.32
UPL	613.60	625.05	-1.83
CIPLA	1,186.40	1,206.40	-1.66
BAJAJ-AUTO	5,005.00	5,085.20	-1.58

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	3,08,52,125	1,530.20	4,765.39
RELIANCE	95,88,393	2,356.50	2,266.19
ICICIBANK	1,27,01,888	951.50	1,213.08
SBIN	1,87,84,139	598.70	1,123.52
MARUTI	9,86,206	10,552.6	1,032.18

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	3,40,59,194	127.20	432.82
HDFCBANK	3,08,52,125	1,530.20	4765.39
POWERGRID	2,11,93,988	199.00	420.79
SBIN	1,87,84,139	598.70	1123.52
ICICIBANK	1,27,01,888	951.50	1213.08



The Indian equity benchmarks continued their falling spree on last trading day of week and concluded the session near intraday low points amid global uncertainty. Escalating diplomatic tensions between India and Canada also impacted sentiments in the markets. Wipro, HDFC Bank and Ultratech Cement were the prime losers among heavy-weights. The broader indices, the BSE Mid cap index ended in red, while Small cap index ended slightly in green. After making cautious start, markets turned volatile amid FIIs outflow. Provisional data from the National Stock Exchange (NSE) showed that foreign institutional investors (FII) sold shares worth Rs 3,007.36 crore on September 21. Besides, traders remained concerned on echoing global uncertainties caused by the Federal Reserve's hawkish stance. Besides, Reserve Bank Deputy Governor Michael D Patra said that India will be a \$5 trillion economy and the third largest in the world by market exchange rates by 2027.

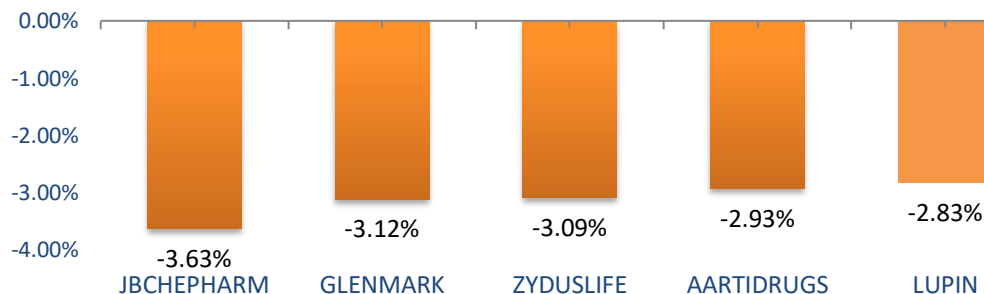
On the global front, European markets were trading mostly in red amid concerns that higher interest rates could weigh on global growth. Survey data released earlier showed that business activity across Germany fell for the third month in a row in September amid a sustained decline in demand for goods and services. Asian markets ended mostly in green; as fears persisted about the Fed staying hawkish and the Bank of Japan maintained its ultra-loose monetary policy. The BSE Sensex ended at 66,009.15, down by 221.09 points or 0.33% after trading in a range of 65,952.83 and 66,445.47.

Source: AceEquity

NEWS BULLETIN

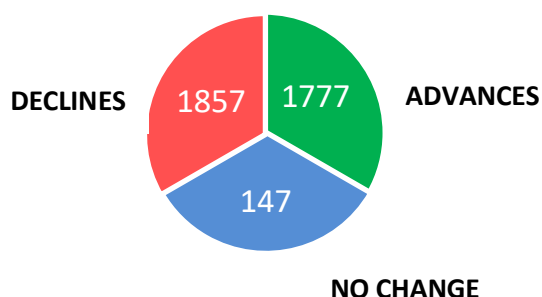
- **Ratnamani Metals & Tubes (RMTL)** has executed a Joint Venture Agreement (JVA) with Technoenergy AG, Switzerland, on September 22, 2023 to form a joint venture company namely Ratnamani Finow Spooling Solutions in India, which shall be a subsidiary Company (JV Company).
- **Zen Technologies** has received order worth of Rs 227.65 crore including GST from the Ministry of Defence, Government of India. Earlier, the company had won order from the Ministry of Defence, Government of India valued at Rs 123.3 crore (inclusive of 18% GST).
- **Lupin** has signed an agreement to acquire five legacy brands in strategic therapy areas - Gastroenterology, Urology and Anti-infectives from Menarini (A. Menarini India and A. Menarini AsiaPacific Holdings), along with the associated trademark rights. The brands are Piclin (Picosulphate Sodium), Menoctyl (Otilonium Bromide), Sucramal O (Sucralfate + Oxetacaine), Pyridium (Phenazopyridine) and Distaclor (Cefaclor).

MARKET DRIVING SECTOR : HEALTHCARE

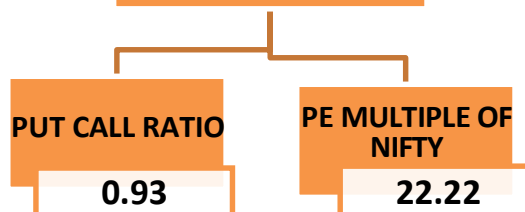


S&P BSE: HEALTHCARE
CLOSING: 50,172.77
CHANGE: -894.21
% CHANGE: -1.75%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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