

25 September 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	66,009.15	66,082.99	66,225.63	65,764.03	66,023.69	+14.54	+0.02
NIFTY	19,674.25	19,678.20	19,734.15	19,601.55	19,674.55	+0.30	+0.00

INDICES SHUT VOLATILE DAY ON A FLAT NOTE

The 30-share BSE Sensex was up by 14.54 points or 0.02% to settle at 66,023.69 and the Nifty was up by 0.03 points or 0.00% to settle at 19,674.55. The BSE Mid-Cap was up by 0.46% and BSE Small Cap was up by 0.12%. On the sectoral front, Realty, FMCG, Consumer Durable, Banking, Metal, and Healthcare were gaining indices; on the flip side, Auto, Capital Goods, Oil & Gas, and IT were the top losing indices. Bajaj Finance, Bajaj Finserv, Kotak Bank and Asian Paint were the top gainers on the Sensex; on the flip side, Infosys, Mahindra & Mahindra, Wipro and TCS 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
BAJFINANCE	7,806.90	7,471.35	4.49
TATACONSUM	905.60	877.75	3.17
BAJAJFINSV	1,574.15	1,543.70	1.97
APOLLOHOSP	5,087.20	4,989.55	1.96
COALINDIA	288.35	283.35	1.76

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HINDALCO	469.00	478.85	-2.06
SBILIFE	1,295.50	1,318.85	-1.77
HEROMOTO	2,973.30	3,022.70	-1.63
INFY	1,475.40	1,496.15	-1.39
M&M	1,587.05	1,607.15	-1.25

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	2,01,04,377	1,528.90	3,082.56
BAJFINANCE	23,47,533	7,806.90	1,822.01
RELIANCE	71,27,442	2,339.50	1,670.32
ICICIBANK	89,97,098	957.00	856.07
MARUTI	7,56,801	10,588.2	805.36

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	2,34,66,981	127.25	298.69
HDFCBANK	2,01,04,377	1,528.90	3082.56
POWERGRID	1,19,51,847	199.45	237.63
SBIN	97,12,784	593.95	577.71
COALINDIA	91,18,957	288.35	260.59



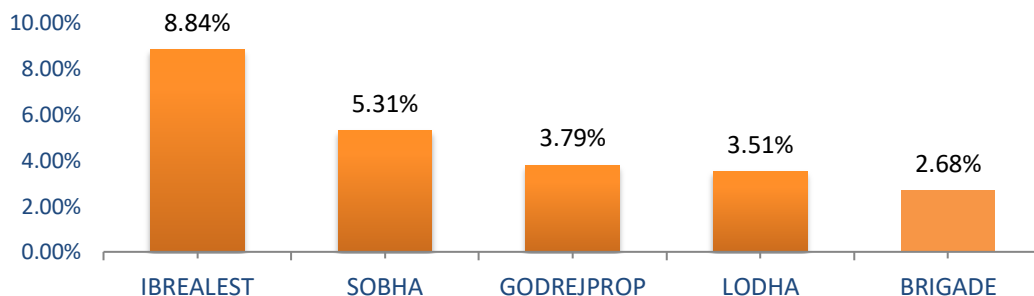
A first trading session of the week remained volatile for Indian equity markets, with both Sensex and Nifty ending slightly higher. After a positive start, markets soon turned negative, amid weak cues from global markets and concerns over the impact of rising oil prices on economic growth. Continued foreign fund outflows dented domestic sentiments. Provisional data from the National Stock Exchange (NSE) showed that foreign institutional investors (FII) sold shares worth Rs 1,326.74 crore on September 22. Traders were concerned as the Reserve Bank said India's foreign exchange reserves declined \$867 million to \$593.037 billion in the week ended September 15. In early noon deals, indices staged recovery to trade above neutral lines, as traders took support from SBI Research's statement that the monetary policy committee of the Reserve Bank of India (RBI) is expected to yet again pause the key repo rate at its next bi-monthly review scheduled in the first week of October.

On the global front, European markets were trading lower, as the UK private sector activity contracted at the fastest pace in more than two-and-a-half years in September amid steep declines in both manufacturing and services activity. Asian markets finished mostly lower on Monday, after Japan's central bank left its massive monetary policy stimulus unchanged on Friday and policymakers remained dovish even as inflation continued to remain above the target and all major central banks are close to the end of their tightening cycle.
Source: AceEquity

NEWS BULLETIN

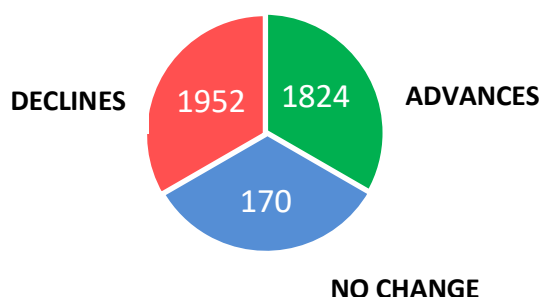
- **Kewal Kiran Clothing (KKCL)** has launched First Exclusive Boys Wear Brand - Junior Killer. This new brand is set to redefine the fashion landscape by offering end to end wardrobe needs of young boys of age 4 to 16, with thoughtfully crafted designs.
- **Indian Hotels Company (IHCL)** has expanded its footprint in Sikkim with the opening of a resort in state capital Gangtok. The 69-key resort, spread over 14 acres of land, is a serene hide-out and is a blend of Sikkimese aesthetics and contemporary design.
- **Hero MotoCorp** has unveiled the new price of the Karizma XMR. The new price will be Rs 1,79,900 onwards (Ex-showroom, Delhi) with effect from October 1, 2023. Hero Karizma XMR will be available at current introductory price of Rs 1,72,900, till Midnight, September 30, 2023.
- **Tata Consultancy Services (TCS)** has expanded its partnership with the Standard Bank Group (SBG), the largest custodian in Africa, to centralize and standardize its custody and securities settlement operations in over 15 markets with the TCS BaNCS Global Securities Processing Platform.

MARKET DRIVING SECTOR : REALTY

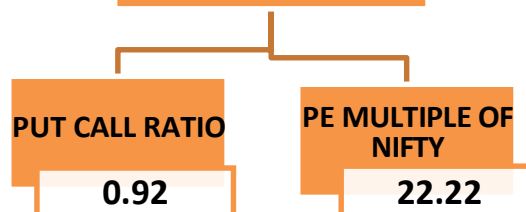


S&P BSE: REALTY
CLOSING: 4,562.09
CHANGE: +70.10
% CHANGE: +1.56%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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