

26 September 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	66,023.69	66,071.63	66,078.26	65,865.63	65,945.47	-78.22	-0.12
NIFTY	19,674.55	19,682.80	19,699.35	19,637.45	19,664.70	-09.85	-0.05

## INDICES REMAINS SIDEWAYS

The 30-share BSE Sensex was down by 78.22 points or 0.12% to settle at 65,945.47 and the Nifty was down by 9.85 points or 0.05% to settle at 19,664.70. The BSE Mid-Cap was down by 0.09% and BSE Small Cap was up by 0.33%. On the sectoral front, FMCG, Auto, Capital Goods, Oil & Gas, Metal, and Realty were gaining indices; on the flip side, Consumer Durable, Banking, Healthcare, and IT were the top losing indices. Nestle, Tata Steel, Mahindra & Mahindra and Bajaj Finance were the top gainers on the Sensex; on the flip side, Tech Mahindra, IndusInd Bank, Infosys and Asian Paint 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
EICHERMOT	3,475.10	3,386.65	2.61
HEROMOTO	3,038.00	2,974.70	2.13
NESTLEIND	22,980.00	22,638.75	1.51
ONGC	187.95	185.50	1.32
BAJAJ-AUTO	5,070.30	5,005.45	1.30

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
CIPLA	1,163.15	1,179.35	-1.37
TECHM	1,282.75	1,299.45	-1.29
INDUSINDBK	1,426.30	1,442.75	-1.14
ADANIENT	2,458.50	2,482.10	-0.95
ASIANPAINT	3,292.00	3,323.25	-0.94

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,37,87,654	1,538.00	2,116.71
RELIANCE	50,43,891	2,340.00	1,181.46
ICICIBANK	1,05,21,409	949.50	1,001.52
BAJFINANCE	12,46,820	7,873.00	979.22
EICHERMOT	21,78,639	3,475.10	761.88

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	4,89,36,598	128.95	633.68
HDFCBANK	1,37,87,654	1,538.00	2116.71
ONGC	1,24,46,655	187.95	232.62
COALINDIA	1,12,56,196	288.00	324.79
NTPC	1,06,81,642	240.20	258.00



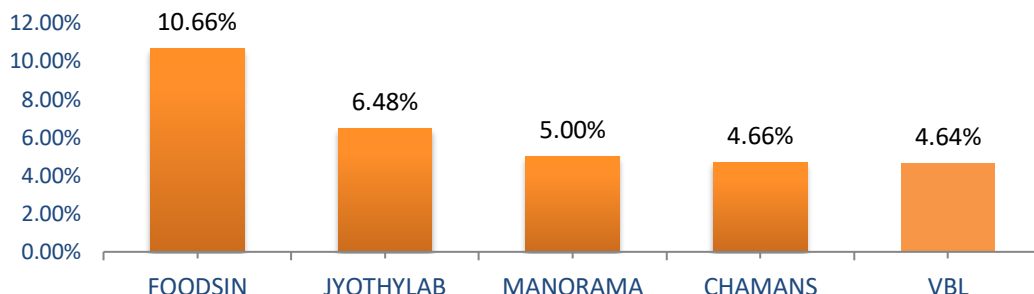
Tuesday turned out to be a volatile session for Indian equity benchmarks, as both Sensex and Nifty altered between green and red during the whole trading session, tracking weak cues from global markets amid concerns over China's property sector and the possible impact of high oil prices on inflation and interest rates. Markets made a cautious start of the day, as foreign fund outflows dampened sentiments in the markets. According to the provisional data available on the NSE, foreign institutional investors (FII) offloaded shares worth net Rs 2,333.03 crore on September 25, 2023. Key indices were volatile during the day however managed to end the session marginally lower, ahead of the 52nd meeting of the GST Council which will be held on October 07, 2023. Downside remained capped as Brazilian Finance Minister Fernando Haddad said Brazil, Mexico and India are some of the countries currently standing in a good position to attract investments.

On the global front, European markets were trading lower, as German business morale weakened for the fifth consecutive month in September to hit the lowest level in 11 months as companies were less satisfied with their current situation amid the subdued economic activity. Asian markets settled mostly lower on Tuesday, after Singapore's industrial production registered a double-digit contraction in August. The Economic Development Board reported that industrial output declined 12.1 percent on a yearly basis in August, following a 1.1 percent drop in July. Source: AceEquity

## NEWS BULLETIN

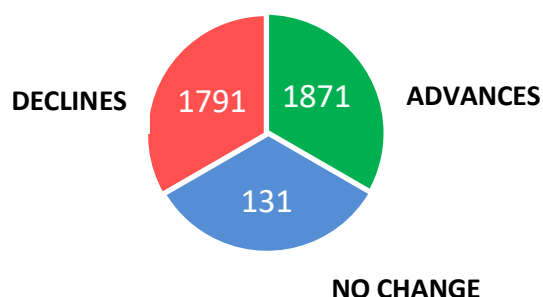
- **EaseMyTrip and DuDigital Global** have forged ground-breaking alliance to revolutionize visa and passport services. This historic partnership brings DuDigital's unmatched expertise in administrative services, visa, passport, and identity management to the forefront.
- **Zuari Industries** has received approval for the issuance of up to 2,000 Unlisted, Unrated, Secured, Redeemable, Non-Convertible Debentures (NCDs) of the face value of Rs 10,00,000 each at par, and aggregate nominal value of up to Rs 200 crore, for cash in dematerialised form, on a private placement basis.
- **Rail Vikas Nigam (RVNL)** has been emerged as the Lowest Bidder (L1) for Construction of 4 Nos. Tunnels (total Length 1.6km).
- **Titan Company's flagship brand -- Tanishq** has launched its brand-new store in Ahmedabad, Gujarat. Spanning across 2750 sq.ft, the store presents an extensive selection of iconic Tanishq designs across dazzling gold, stunning diamonds, kundan and polki.

## MARKET DRIVING SECTOR : FMCG

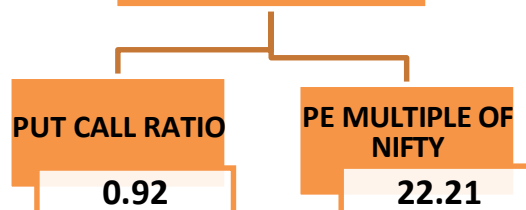


**S&P BSE: FMCG**  
**CLOSING: 18,767.80**  
**CHANGE: +80.97**  
**% CHANGE: +0.43%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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