

27 September 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	65,945.47	65,925.64	66,172.27	65,549.96	66,118.69	+173.22	+0.26
NIFTY	19,664.70	19,637.05	19,730.70	19,554.00	19,716.45	+51.75	+0.26

INDICES RECOVERS FROM LOWER LEVELS

The 30-share BSE Sensex was up by 173.22 points or 0.26% to settle at 66118.69 and the Nifty was up by 51.75 points or 0.26% to settle at 19,716.45. The BSE Mid-Cap was up by 0.76% and BSE Small Cap was up by 0.68%. On the sectoral front, Healthcare, FMCG, IT, Auto, Capital Goods, Metal, and Realty were gaining indices; on the flip side, Oil & Gas, Consumer Durable, and Banking were the top losing indices. Larsen & Toubro, ITC, Sunpharma and Maruti were the top gainers on the Sensex; on the flip side, Titan, SBIN, HDFC Bank and ICICI Bank 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
LT	2,971.00	2,912.55	2.01
COALINDIA	291.95	286.75	1.81
ITC	449.35	442.45	1.56
CIPLA	1,180.00	1,163.65	1.41
LTIM	5,434.25	5,363.05	1.33

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
TITAN	3,217.50	3,262.60	-1.38
GRASIM	1,932.40	1,958.00	-1.31
HEROMOTO	3,007.15	3,034.35	-0.90
SBIN	590.00	594.40	-0.74
ICICIBANK	942.00	948.70	-0.71

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,96,69,269	1,527.45	2,998.34
ICICIBANK	1,51,52,973	942.00	1,425.59
RELIANCE	58,61,389	2,371.00	1,380.78
LT	29,03,693	2,971.00	860.15
SBIN	98,65,347	590.00	582.78

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	3,32,77,329	128.40	425.22
HDFCBANK	1,96,69,269	1,527.45	2998.34
ICICIBANK	1,51,52,973	942.00	1425.59
COALINDIA	1,28,05,340	291.95	371.41
ITC	1,04,90,786	449.35	467.66



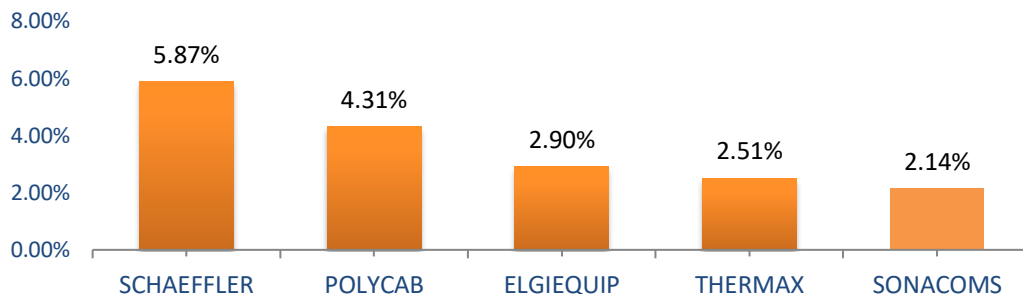
Buying which emerged in late afternoon session helped Indian benchmarks to end the session higher on Wednesday, as traders went on value buying. In first half of the session, indices witnessed selling pressure tracking sell-off on Wall Street and mixed cues from Asian counterparts. Investors were worried about the Fed's rate path and a possible U.S. government shutdown. As for broader indices, the BSE Mid cap index and Small cap index were ended with gains of over half percent each. Markets made negative start and extended their losses amid persistent foreign fund outflows. Provisional data from the National Stock Exchange (NSE) showed that foreign institutional investors (FII) sold shares worth Rs 693.47 crore on September 26. As per a private report, FIIs have sold about \$1.6 billion in Indian equities in September, the most since January 2023. The report added this trend was driven by elevated valuations in the domestic market and negative global cues.

On the global front, European markets were trading mostly in red as investors continue to assess inflation, interest rates and the health of the global economy. Asian markets ended mostly in green as investors welcomed improved industrial data from China. Back home, Prime Minister Narendra Modi has said their aim is to make India a global growth engine and that the country will soon emerge as an economic powerhouse of the world. The BSE Sensex ended at 66,118.69, up by 173.22 points or 0.26% after trading in a range of 65,549.96 and 66,172.27. Source: AceEquity

NEWS BULLETIN

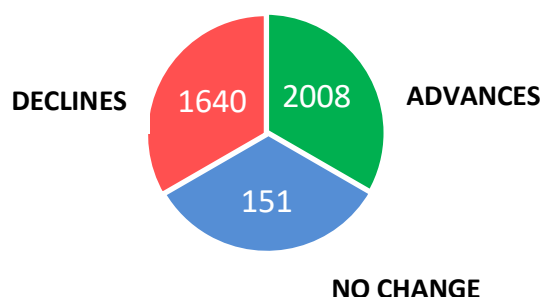
- **Ahluwalia Contracts (India)** has secured orders for Construction of Expansion of Max Super Specialty Hospital at SAS Nagar, Mohali (Punjab) on EPC Basis for Rs 215.46 crore and Construction of Max Super Specialty Hospital at Sector-56, Gurugram, Haryana on EPC Basis for Rs 616.94 crore. The order inflow during the current FY 2023-24 stands at Rs 5259.50 crore till date.
- **Infosys** has launched Infosys Cobalt Airline Cloud (ICAC) a first-of-its-kind industry cloud offering designed for commercial airlines to help them accelerate their digital transformation journey. Infosys has leveraged its deep domain experience and expertise in the travel and hospitality sector to build ICAC, which will aim to deliver personalized experiences, optimized operations and net zero journeys for clients.
- **Drone Acharya Aerial Innovations** has secured a \$1.26 million order for the Supply of Survey/Surveillance Drones and IT Hardware, Drone Data Acquisition and Processing Services and Supply of Decision Support System / Project Management Software in Qatar.

MARKET DRIVING SECTOR : CAPITAL GOODS

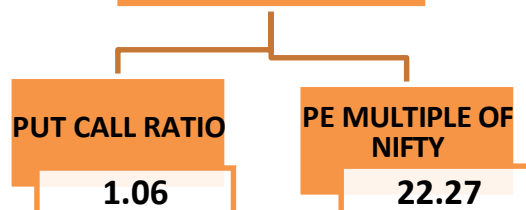


S&P BSE: CAPITAL GOODS
CLOSING: 47,225.59
CHANGE: +532.92
% CHANGE: +1.14%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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