

28 September 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	66,118.69	66,406.01	66,406.01	65,423.39	65,508.32	-610.37	-0.92
NIFTY	19,716.45	19,761.80	19,766.65	19,492.10	19,523.55	-192.90	-0.98

THE MONTHLY EXPIRY BELONG TO BEARS

The 30-share BSE Sensex was down by 610.37 points or 0.92% to settle at 65,508.32 and the Nifty was down by 192.90 points or 0.98% to settle at 19,523.55. The BSE Mid-Cap was down by 1.19% and BSE Small Cap was down by 0.34%. On the sectoral front, Capital Goods was gaining index; on the flip side, IT, Realty, Healthcare, FMCG, Auto, Metal, Oil & Gas, Consumer Durable, and Banking were the top losing indices. Larsen & Toubro, Powergrid, Bharti Airtel and Axis Bank were the top gainers on the Sensex; on the flip side, Tech Mahindra, Asian Paint, Wipro and Mahindra & Mahindra 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	3,025.45	2,965.05	2.04
BHARTIARTL	931.00	920.25	1.17
ONGC	188.20	187.25	0.51
COALINDIA	292.90	291.55	0.46
POWERGRID	200.20	199.35	0.43

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TECHM	1,235.05	1,288.65	-4.16
ASIANPAINT	3,180.00	3,301.80	-3.69
LTIM	5,272.55	5,436.90	-3.02
M&M	1,554.35	1,589.20	-2.19
WIPRO	407.00	415.65	-2.08

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	2,76,77,094	1,518.40	4225.19
ICICIBANK	2,59,91,282	942.75	2444.84
RELIANCE	72,59,173	2,339.00	1707.38
AXISBANK	1,58,18,489	1,028.75	1630.62
KOTAKBANK	82,63,197	1,731.90	1439.16

Most Active (by volume)

Name	Qty	Pr.	Value CR
POWERGRID	5,01,85,120	200.20	1006.16
NTPC	3,28,87,087	239.75	781.59
TATASTEEL	2,99,82,233	127.25	382.81
HDFCBANK	2,76,77,094	1,518.40	4225.19
ICICIBANK	2,59,91,282	942.75	2444.84



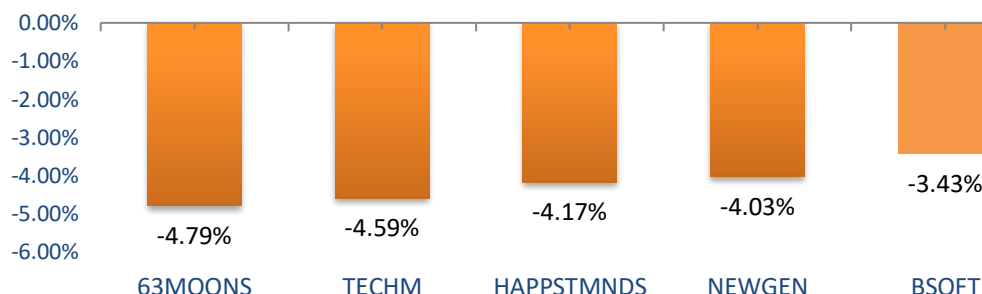
Indian equity markets concluded Thursday's trade with a cut of around a percent amid monthly F&O expiry. Besides, rising crude oil prices dampened investor's sentiments. Markets ended session near day's lowest points. Investors were cautious ahead of India's fiscal deficit data, which scheduled to be released on September 29. Rising concerns about fed interest rates and the outlook for global economic growth also weighed on the Indian markets. After making slightly positive start, markets failed to hold gains and entered into red terrain amid persistent foreign fund outflows. Provisional data from the National Stock Exchange (NSE) showed that foreign institutional investors (FII) sold shares worth Rs 354.35 crore on September 27. After making slightly positive start, markets failed to hold gains and entered into red terrain amid persistent foreign fund outflows. Provisional data from the National Stock Exchange (NSE) showed that foreign institutional investors (FII) sold shares worth Rs 354.35 crore on September 27.

On the global front, European markets were trading lower amid persistent fears of higher U.S. interest rates and concerns over China's beleaguered property market. Spanish inflation accelerated for a second straight month in September due mainly to higher electricity and fuel prices, preliminary data showed earlier in the day. German inflation data is awaited later in the day. Asian markets ended mixed as traders reacted to the US dollar's continued strength against major Asian currencies and the jump in crude oil prices to one year highs. Source: AceEquity

NEWS BULLETIN

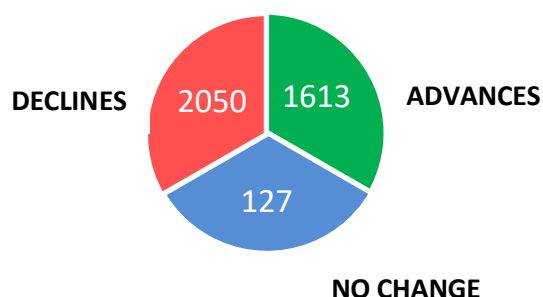
- **KP Energy** has been awarded contract(s) through the Notification of Award (NoA) for the development of a 464.10 MW Balance of System Package for an Inter-State Transmission System (ISTS) Connected Wind Energy Project to be developed in the state of Gujarat. These contract(s) have been awarded by NTPC Renewable Energy (NTPC REL) through a competitive bidding process. This project falls under the Company's 'Captive Power Producer (CPP)' business segment.
- **Dr. Reddy's Laboratories** has received approval for incorporation of a Wholly-owned Subsidiary (WOS) of the Company. The proposed WOS will carry on the business related to medical nutrition, specialized nutrition, nutraceuticals, vitamins, minerals, herbals and supplements, and related foods or drugs.
- **Rallis India** has launched its differentiated crop protection product, 'Benzilla'. Backed by extensive research and field trials, Benzilla is a cutting-edge product powered by patented BPX technology from Japan that promises to redefine crop management practices, boost yields and benefit farmers.

MARKET DRIVING SECTOR : IT

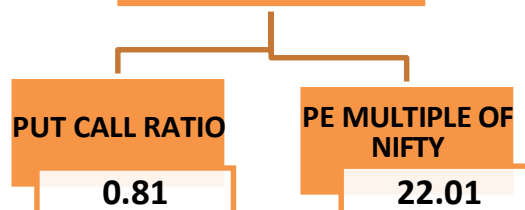


S&P BSE: IT
CLOSING: 32,144.61
CHANGE: -600.98
% CHANGE: -1.84%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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