

03rd Oct 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	65,828.41	65,813.42	65,813.50	65,344.59	65,512.10	-316.31	-0.48
NIFTY	19,638.30	19,622.40	19,623.20	19,479.65	19,528.75	-109.55	-0.56

BOURSES START THE WEEK ON A WEAK NOTE

The 30-share BSE Sensex was down by 316.31 points or 0.48% to settle at 65,512.10 and the Nifty was down by 109.55 points or 0.56% to settle at 19,528.75. The BSE Mid-Cap was up by 0.09% and BSE Small Cap was up by 0.61%. On the sectoral front, Capital Goods, Consumer Durables, and Realty were the top gaining index; on the flip side, Oil & Gas, Auto, Metal, IT, Bank, Healthcare, and FMCG were the top losing indices. Bajaj Finance, L&T, Titan, and Bajaj Finserv were the top gainers on the Sensex; on the flip side Maruti Suzuki, NTPC, Tata Motors, and Sun Pharma were the top losers on the Sensex. On global front, Asian markets shut the day on a rednote and European indices also are trading on a negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
BAJFINANCE	7,967.10	7,810.75	2.00
LT	3,074.00	3,023.55	1.67
TITAN	3,191.00	3,148.80	1.34
BAJAJFINSV	1,560.80	1,540.25	1.33
ADANIPTS	831.65	825.15	0.79

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ONGC	184.60	191.85	-3.78
EICHERMOT	3,354.50	3,446.95	-2.68
MARUTI	10,327.00	10,610.60	-2.67
HINDALCO	480.35	492.65	-2.50
DRREDDY	5,458.05	5,587.00	-2.31

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
AXISBANK	1,15,89,322	1,038.50	1,204.87
LT	32,54,492	3,074.00	990.86
SBIN	1,53,22,196	603.10	915.69
BAJFINANCE	9,44,555	7,967.10	745.11
BHARTIARTL	43,38,272	927.00	400.52

Most Active (by volume)			
Name	Qty	Pr.	Value CR
SBIN	1,53,22,196	603.10	915.69
AXISBANK	1,15,89,322	1,038.50	1,204.8
BHARTIARTL	43,38,272	927.00	400.52
LT	32,54,492	3,074.00	990.86
ADANIPTS	24,53,090	831.65	203.69

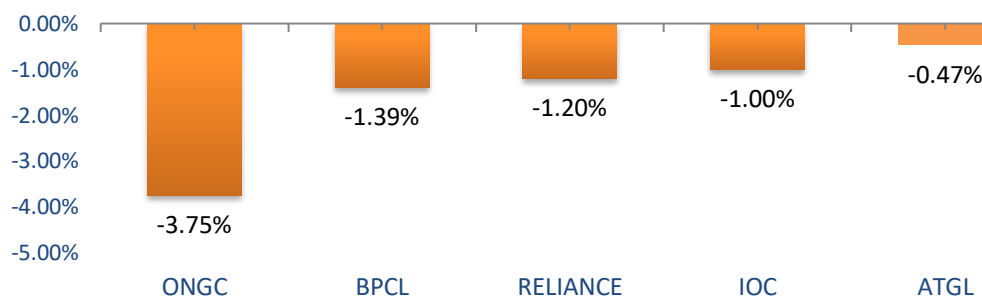


Indian equity markets spent entire day in red territory. Investors maintained risk-averse approach ahead of Reserve Bank of India (RBI) interest rate decision, which scheduled to be released on September 06.. Some Federal Reserve officials suggested that the U.S. central bank may have to raise its key interest rate higher than previously expected in the current battle against inflation. Markets made negative start and extended their losses tracking weakness in global peers. Foreign fund outflows also dented sentiments. Traders were worried as a finance ministry report said the government's total gross debt increased by 2.2 per cent quarter-on-quarter to Rs 159.53 lakh crore in April-June this fiscal. Markets continued to reel under pressure in afternoon session even after finance ministry said gross goods and services tax (GST) collection rose 10 percent to over Rs 1.62 lakh crore in September 2023, crossing the Rs 1.6 lakh crore mark for the fourth time during the current financial year (FY24), as compared to Rs 1.47 lakh crore in September 2022. Meanwhile, the output of eight core industries rose to a 14-month high of 12.1 percent in August 2023 as against 4.2 percent a year ago, mainly due to expansion in production of coal, crude oil, and natural gas. Indices remained in red till the end, as India's manufacturing sector growth eased in the month of September. On the global front, European markets were trading mostly in red as investors digested gloomy economic data from the region. Asian markets ended in red as traders await key monthly US employment data later in the week for cues on the outlook for interest rates. Source: AceEquity

NEWS BULLETIN

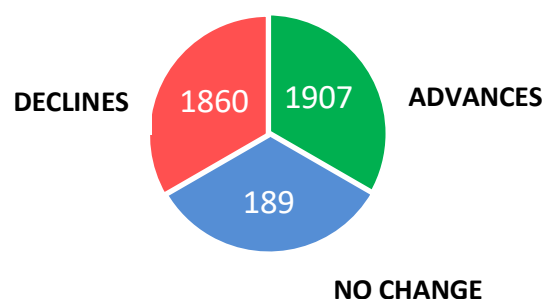
- **Vedanta** has planned to demerge its business units into independent pure play companies to unlock value and attract big ticket investment into the expansion and growth of each of the businesses.
- **Coal India** has reported 12.6 per cent year-on-year (Y-o-Y) rise in coal production to 51.4 million tonnes (MT) during September. The company had produced 45.7 MT of coal in the year-ago period. The company's output in the April-September period also increased by 11.3 per cent to 332.9 MT against 299 MT a year ago.
- **UltraTech Cement's** consolidated sales rose 15.54 per cent to 26.69 million tonne (MT) year-on-year in the second quarter ended September 30, 2023. The company produced 23.10 MT cement in July-September period a year ago. Total sales volume in the domestic market was up 15.37 per cent to 25.66 MT during the quarter under review.
- **Mphasis** has entered into a partnership with CoreStack, a global multi-cloud governance provider. CoreStack will play a vital role in Mphasis' Cloud Business Solutions (CBS) and Agile IT Operations portfolio.

MARKET DRIVING SECTOR : OIL & GAS

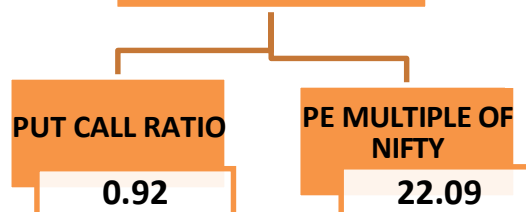


S&P BSE: OIL & GAS
CLOSING: 18,778.03
CHANGE: -247.63
% CHANGE: -1.30%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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