

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	65,226.04	65,598.26	65,753.20	65,443.34	65,631.57	+405.53	+0.62
NIFTY	19,436.10	19,521.85	19,576.95	19,487.30	19,545.75	+109.65	+0.56

A GAP UP OPENING BREAKS TWO DAY LOSING STREAK

The 30-share BSE Sensex was up by 405.53 points or 0.62% to settle at 65,631.57 and the Nifty was up by 109.65 points or 0.56% to settle at 19,545.75. The BSE Mid-Cap was down by 0.03% and BSE Small Cap was up by 0.59%. On the sectoral front, Capital Goods, Consumer Durables, IT, Bank, Oil & Gas, Auto, and Realty were the top gaining index; on the flip side, Metal, Healthcare and FMCG were the top losing indices. Larsen & Toubro, Titan, TCS and Mahindra & Mahindra were the top gainers on the Sensex; on the flip side Powergrid, NTPC, Nestle India and HCL Tech 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
BAJAJ-AUTO	5,024.55	4,918.60	2.15
LT	3,090.00	3,027.75	2.06
M&M	1,548.85	1,522.10	1.76
TITAN	3,218.65	3,166.65	1.64
TCS	3,590.00	3,537.75	1.48

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
POWERGRID	196.60	199.00	-1.21
HINDALCO	471.10	473.40	-0.49
CIPLA	1,162.40	1,167.05	-0.40
NTPC	234.20	235.15	-0.40
NESTLEIND	22,900.00	22,986.20	-0.38

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,42,56,337	1,535.85	3,737.30
RELIANCE	54,76,841	2,312.90	1,269.21
INFY	73,84,621	1,461.10	1,080.77
TCS	29,90,768	3,590.00	1,073.53
LT	34,13,447	3,090.00	1,049.53

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	2,70,63,441	125.55	339.13
HDFCBANK	2,42,56,337	1,535.85	3737.30
NTPC	2,24,72,389	234.20	524.75
POWERGRID	1,45,75,590	196.60	286.45
SBIN	1,32,48,028	592.00	783.20



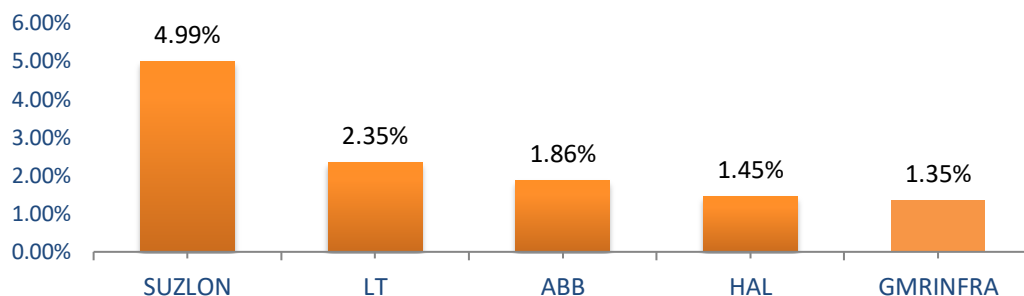
The Indian benchmarks ended Thursday's session with gains of over half a percent, as investors braced for Reserve Bank of India's (RBI) interest rate decision. There are expectations that RBI will keep key rates on hold. Positive India's services sector data offered some support to markets. Sector wise, IT and banking stocks witnessing buying interest. As for broader indices, Small cap index ended in green, while the BSE Mid cap index ended marginally in red. Markets made positive start and remained higher after a recovery in global markets as US yields eased from record highs and crude oil cooled off to \$86 per barrel. Some support also came as Finance Secretary T V Somanathan said India's retail inflation is likely to ease by December as seasonal factors become more favourable. Indices added more points in afternoon session and ended higher with over half a percent gains, as India's services sector growth strengthened in the month of September, as a positive demand environment boosted intakes of new business and output volumes.

On the global front, European markets were trading mostly in red after a survey showed that Britain's construction industry experienced the biggest slide in activity in more than three years last month. Asian markets ended mostly in green after oil prices tumbled and bond yields on both sides of the Atlantic fell from their highest levels for more than a decade amid signs that U.S. economic growth is slowing. (Ind-Ra) in its latest report has said that unsecured loans are on the rise, but the RBI is unlikely to put regulations to curb the same. Source: AceEquity

NEWS BULLETIN

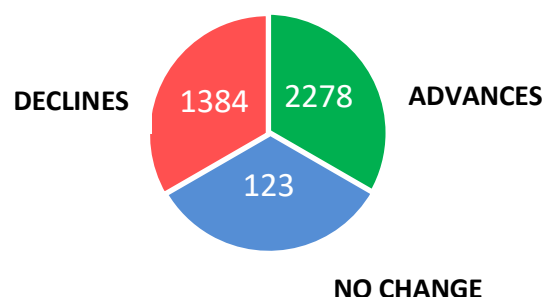
- **Tata Consultancy Services (TCS)** has been positioned as a Market Leader (Horizon 3) in the HFS Horizons for Supply Chain Service Providers. The study evaluates the capabilities of 18 providers across a range of dimensions to understand the Why, What, How, and So what of their service offerings.
- **Archean Chemical Industries** has incorporated a wholly owned subsidiary (WOS) namely 'Idealis Chemicals' in India. The company has incorporated a WOS on October 5, 2023. The above WOS has been incorporated in India and is yet to commence its business operations.
- **Infosys and Economist Impact**, an arm of The Economist Group that works with organisations globally to further their missions, have launched the Value Chain Navigator (VCN) to help businesses understand and address their scope 3 emissions.
- **Lemon Tree Hotels** has launched Aurika, Mumbai Skycity, the third property under the company's upscale brand - Aurika Hotels & Resorts, as well as its third hotel in the global city of Mumbai. This occasion marks the launch of India's largest hotel, by number of rooms.

MARKET DRIVING SECTOR : CAPITAL GOODS

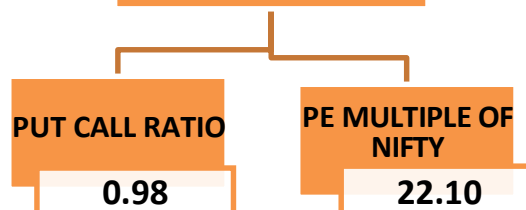


S&P BSE: CAPITAL GOODS
CLOSING: 48,193.51
CHANGE: +623.50
% CHANGE: +1.31%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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