

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	65,995.63	65,560.07	65,789.98	65,434.61	65,512.39	-483.24	-0.73
NIFTY	19,653.50	19,539.45	19,588.95	19,480.50	19,512.35	-141.15	-0.72

MARKET TUMBLES AMID GLOBAL CONCERN

The 30-share BSE Sensex was down by 483.24 points or 0.73% to settle at 65,512.39 and the Nifty was down by 141.15 points or 0.72% to settle at 19,512.35. The BSE Mid-Cap was down by 1.12% and BSE Small Cap was down by 1.72%. On the sectoral front, there was the no gaining index; on the flip side, Consumer Durables, Capital Goods, IT, Bank, Oil & Gas, Auto, Metal, Realty, Healthcare and FMCG were the top losing indices. HCL Tech, TCS and Hindustan Unilever were the top gainers on the Sensex; on the flip side Mahindra & Mahindra, Bajaj Finance, Tata Steel and SBIN 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
DRREDDY	5,486.00	5,424.90	1.13
HCLTECH	1,249.30	1,237.70	0.94
TATACONSUM	879.65	874.75	0.56
ONGC	182.20	181.45	0.41
HINDUNILVR	2,508.00	2,499.40	0.34

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ADANI PORTS	788.50	830.75	-5.09
HDFCLIFE	614.00	630.90	-2.68
HEROMOTO	2,962.00	3,038.00	-2.50
M&M	1,515.00	1,548.85	-2.19
TATASTEEL	123.35	125.90	-2.03

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
TCS	42,33,074	3,633.00	1,546.23
HDFCBANK	82,27,486	1,516.00	1,248.68
RELIANCE	37,88,439	2,295.15	872.46
AXISBANK	68,23,214	996.45	678.60
ICICIBANK	67,25,306	939.40	631.90

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	2,14,57,836	123.35	265.82
ONGC	1,46,22,727	182.20	267.19
NTPC	1,06,59,145	234.25	249.16
SBIN	91,89,597	584.55	537.16
HDFCBANK	82,27,486	1,516.00	1248.68



Indian equity markets witnessed selling pressure on Monday and ended with cut of over half a percent amid geopolitical tensions, following the sudden escalation of war between Israel and Palestine-based militant group Hamas over the weekend. Besides, rising oil prices dampened investors sentiments. Markets participants remained on side-lines ahead of Index of industrial production (IIP) data for August and Consumer price index (CPI) data for September slated to be announced on October 12. All the sectoral indices on the BSE ended in red. Markets made gap-down opening and remained lower amid mixed cues from other Asian markets. Traders were cautious as the RBI data showed that India's forex reserves drop by \$3.79 billion to \$586.91 billion for the week ended September 29. Investors overlooked that CII's business confidence index improved to 67.1 in the July-September quarter of FY24, reflecting robust macro fundamentals of India's economy despite global headwinds.

On the global front, European markets were mostly trading in red as military clashes in the Middle East sparked a rush to safe-haven assets such as bonds and gold, while also boosting oil prices by over 3%. Asian markets ended mostly higher on Monday ahead to the release of US inflation data and the minutes of the Federal Reserve's latest policy meeting later this week for further clues about the US Federal Reserve's future interest rate path. The BSE Sensex ended at 65,512.39, down by 483.24 points or 0.73% after trading in a range of 65,434.61 and 65,789.98.

Source: AceEquity

NEWS BULLETIN

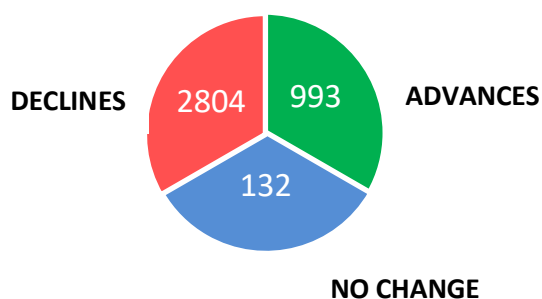
- **IRB Infrastructure Developers'** gross toll collection in September 2023 stood at Rs 420.95 crore as compared to Rs 328.24 crore in September 2022.
- **One97 Communications' (Paytm)** wholly-owned subsidiary -- Paytm Payments Services has become the first in the industry to enable merchants with Alternate ID (ALT ID) based Guest Checkout solution across networks. This allows customers to checkout as a guest without saving sensitive card details on an ecommerce/merchant website for a transaction.
- **Alphalogic Industries** has won order from Trinity Engineers to design, manufacture, supply and installation of MS Pallet and Storage Racking Solutions for their units based in Pune in Maharashtra. The Broad consideration or size of the order is worth Rs 30.69 lakh inclusive of GST.
- **Vascon Engineers** has received Letter of Intent (LoI) amounting to Rs 262.19 crore (including GST) from Bridge and Roof Company India (A Government of India Enterprise), for Planning, Designing, Construction, IT (Networking) and Maintenance of Government Medical College at District Kanker.

MARKET DRIVING SECTOR : CONSUMER DURABLES

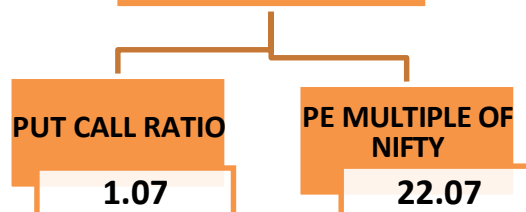


S&P BSE: CONSUMER DURABLES
CLOSING: 45,865.94
CHANGE: -662.90
% CHANGE: -1.42%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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