

19 Oct 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	65,877.02	65,484.61	65,869.65	65,343.50	65,629.24	-247.78	-0.38
NIFTY	19,671.10	19,545.20	19,681.80	19,512.35	19,624.70	-46.40	-0.24

## INDICES BOUNCE FROM LOWER LEVELS

The 30-share BSE Sensex was down by 247.78 points or 0.38% to settle at 65,629.24 and the Nifty was down by 46.40 points or 0.24% to settle at 19,624.70. The BSE Mid-Cap was down by 0.08% and BSE Small Cap was up by 0.07%. On the sectoral front, FMCG, Consumer Durables and Auto were gaining index; on the flip side, Metal, Healthcare, Capital Goods, Bank, IT, Oil & Gas, Realty was losing index. Nestle, Ultratech Cement, IndusInd Bank and Bajaj Finserv were the top gainers on the Sensex; on the flip side, Wipro, Tech Mahindra, NTPC and Sunpharma were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices also are trading on a negative note.

### Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
BAJAJ-AUTO	5,473.75	5,137.35	6.55
LTIM	5,463.00	5,155.20	5.97
HEROMOTO	3,271.00	3,153.15	3.74
NESTLEIND	24,080.00	23,262.95	3.51
ULTRACEMCO	8,514.65	8,278.30	2.86

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
WIPRO	395.05	407.45	-3.04
TECHM	1,169.00	1,187.10	-1.52
SUNPHARMA	1,136.60	1,153.40	-1.46
NTPC	239.00	242.00	-1.24
UPL	613.00	620.55	-1.22

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,51,26,182	1,514.50	2,294.05
INDUSINDBK	1,39,48,984	1,448.05	2,018.69
BAJAJ-AUTO	28,38,352	5,473.75	1,531.85
RELIANCE	60,16,278	2,304.65	1,389.80
INFY	67,95,691	1,434.00	975.01

### Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	3,09,41,319	125.80	388.19
HDFCBANK	1,51,26,182	1,514.50	2294.05
INDUSINDBK	1,39,48,984	1,448.05	2018.70
POWERGRID	1,31,92,888	205.50	270.84
WIPRO	1,28,14,551	395.05	505.20



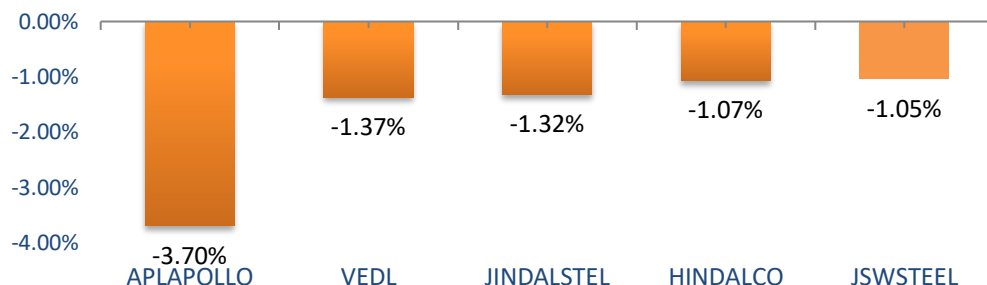
Indian markets remained back foot on Thursday's session with the Sensex and the Nifty settling below their crucial 65,700 and 19,650 marks, respectively. Markets witnessed weak trade throughout the day, as investors were worried after risk of escalating conflict in the Middle East threatened to disrupt oil supplies from the region, with Iran calling for an oil embargo to be imposed on Israel. Besides, Wipro's underwhelming Q2FY24 report had a spillover effect on the IT industry, causing several IT stocks to decline. The broader indices, the BSE Mid cap index ended in red, while Small cap index concluded marginally in green. Markets made gap down opening and remained lower following weak global market cues as US Treasury yields jumped to multiyear highs, with the 10-year Treasury yield breaking above 4.9% for the first time since 2007.

On the global front, European markets were trading lower as a raft of dismal corporate earnings, including from packaged food giant Nestle, worsened an already risk-averse mood, driven by jitters around the Middle East war and uncertainty over interest rates. Asian markets ended mostly in red after the U.S. tightened restrictions on China's semiconductor industry, and troubled property developer Country Garden missed a \$15 million coupon repayment. Back home, the Directorate General of Goods and Services Tax Intelligence (DGGI) has detected tax evasion amounting to Rs 1.36 trillion in the current financial year, recovering Rs 14,108 crore. The BSE Sensex ended at 65,629.24, down by 247.78 points or 0.38%.  
Source: AceEquity

## NEWS BULLETIN

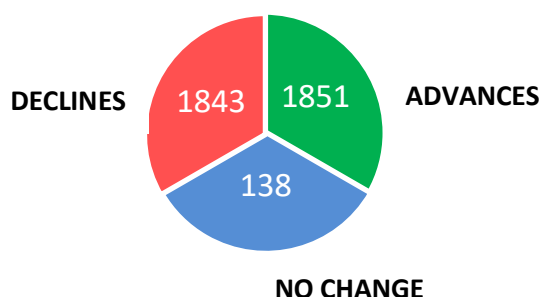
- **Central Bank of India** has entered into a strategic Co-Lending Partnership with M/s Capri Global Housing Finance to offer Home Loans at competitive rates, subject to compliance with the applicable law(s) including the applicable guidelines issued by Reserve Bank of India (RBI).
- **Ultratech Cement** has reported 67.83% rise in its net profit at Rs 1,205.65 crore for the quarter under review as compared to Rs 718.37 crore for the same quarter in the previous year.
- **Bharti Airtel** has extended 5G coverage to 50 districts of Rajasthan, empowering over 2.7 million customers to enjoy the power of 5G.
- **South Indian Bank** has reported 23.18% rise in its net profit at Rs 274.81 crore for the quarter under review as compared to Rs 223.10 crore for the same quarter in the previous year. Total income of the Bank increased by 24.53% at Rs 2484.77 crore for Q2FY24 as compared Rs 1995.24 crore for the corresponding quarter previous year.

## MARKET DRIVING SECTOR : METAL

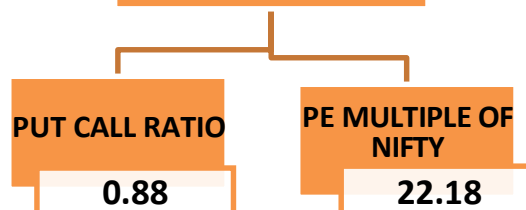


**S&P BSE: METAL**  
**CLOSING: 23,321.49**  
**CHANGE: -224.24**  
**% CHANGE: -0.95%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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