

25 Oct 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	64,571.88	64,619.27	64,787.08	63,912.16	64,049.06	-522.82	-0.81
NIFTY	19,281.75	19,286.45	19,347.30	19,074.15	19,122.15	-159.60	-0.83

## NO COME BACK FOR BULLS

The 30-share BSE Sensex was down by 522.82 points or 0.81% to settle at 64,049.06 and the Nifty was down by 159.60 points or 0.83% to settle at 19,122.15. The BSE Mid-Cap was down by 0.52% and BSE Small Cap was down by 0.77%. On the sectoral front, Metal was gaining index; on the flip side, Capital Goods, Healthcare, Bank, IT, Oil & Gas, Realty, FMCG, Auto, Consumer Durables was losing index. Tata Steel, SBIN, Mahindra & Mahindra and Maruti were the top gainers on the Sensex; on the flip side, Infosys, Bharti Airtel, NTPC and IndusInd 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
TATASTEEL	121.30	120.00	1.08
COALINDIA	309.10	306.10	0.98
HINDALCO	460.50	456.70	0.83
TATACONSUM	889.05	883.10	0.67
SBIN	556.60	552.95	0.66

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
APOLLOHOSP	4,850.00	4,969.55	-2.41
ADANIEN	2,261.00	2,308.65	-2.06
SBILIFE	1,311.00	1,338.40	-2.05
CIPLA	1,161.25	1,183.80	-1.90
EICHERMOT	3,386.50	3,446.35	-1.74

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,41,55,998	1,494.20	2131.68
RELIANCE	58,10,344	2,256.00	1314.00
ICICIBANK	1,25,93,434	917.40	1160.06
INFY	69,40,777	1,372.00	955.84
SBIN	1,21,34,624	556.60	676.71

### Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	2,73,46,103	121.30	333.05
NTPC	2,39,49,207	232.45	555.77
POWERGRID	1,68,17,158	199.85	335.44
HDFCBANK	1,41,55,998	1,494.20	2131.68
ICICIBANK	1,25,93,434	917.40	1160.06



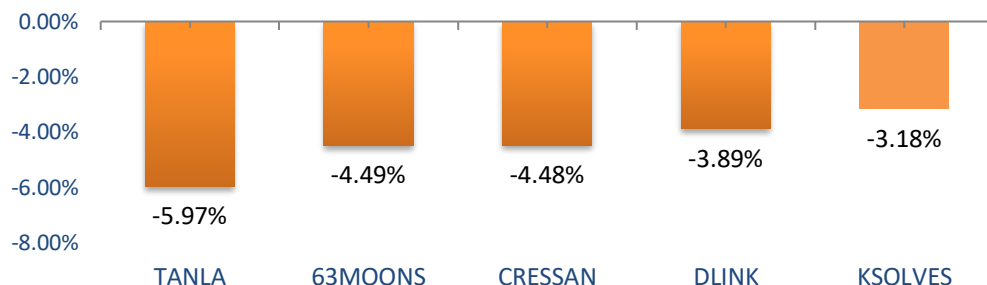
Heavy selling pressure in second half of session prompted Indian benchmarks to end Wednesday's session with cut of around a percent as uncertainties associated with the Israel-Hamas conflict continued to weigh on markets. Besides, traders avoided to take position ahead of monthly F&O expiry. Traders were cautious ahead of Fed Chair Jerome Powell's speech later today. IT and Banking stock were on the priority list of the sellers. The broader indices, the BSE Mid cap index and Small cap index ended in red. After making slightly positive start, markets turned volatile, as traders were worried as a study by rating agency Crisil found that higher growth in vegetable demand relative to supply in the recent past has led to an upward trend in inflation, with spikes becoming more frequent.

On the global front, European markets were trading lower as investors digested a slew of mixed earnings reports from the region, while weakness in energy firms on lower crude prices added to the declines. Asian markets ended mostly in green with Chinese and Hong Kong markets rising sharply, spurred by rare fiscal measures from Beijing to address the ongoing severe liquidity crunch in the domestic property market as well as to stem the stock market's sell-off. Back home, the provisional data from the Indian Bureau of Mines (IBM) has stated that India's mineral output increased by 12.3 per cent in the month of August 2023 as compared to the same month a year ago.  
Source: AceEquity

## NEWS BULLETIN

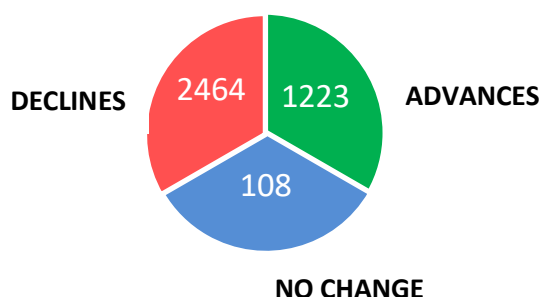
- **ITCONS E-Solutions** has received work order from Ministry of Consumer Affairs Food and Public Distribution, Department of Food and Public Distribution, Central Warehousing Corporation (CWC) Bangalore amounting to Rs 5.76 crore for providing manpower services for Two years.
- **Ugar Sugar Works** has started sugar crushing for the season 2023-24 at Ugar Unit. The crushing operation will pick up to its full capacity in due course.
- **Choice International's subsidiary** -- Choice Insurance Broking has been appointed as the Intermediary for the Centrally Sponsored Livestock Insurance Scheme in Karnataka for the fiscal year 2023-24.
- **Welspun Living** has received approval for investment not exceeding Rs 56.40 crore in a Special Purpose Vehicle (SPV) for supply of 47 MW Renewable Energy Round-The-Clock (RE-RTC) basis for Anjar operations at the most competitive rates, which will make the company's Anjar Unit about 80% RE by the financial year 2026 with a reduction in the cost of power.

## MARKET DRIVING SECTOR : IT

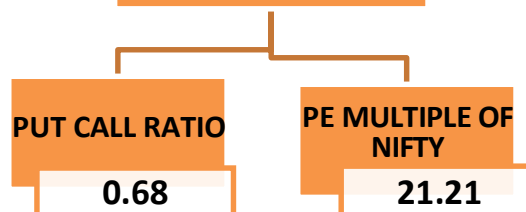


**S&P BSE: IT**  
**CLOSING: 30,902.51**  
**CHANGE: -352.53**  
**% CHANGE: -1.13%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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