

26 Oct 2023



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	64,049.06	63,774.16	63,774.16	63,092.98	63,148.15	-900.91	-1.41
NIFTY	19,122.15	19,027.25	19,041.70	18,837.85	18,857.25	-264.90	-1.39

EXPIRY BELONG TO BEARS

The 30-share BSE Sensex was down by 900.91 points or 1.41% to settle at 63,148.15 and the Nifty was down by 264.90 points or 1.39% to settle at 18,857.25. The BSE Mid-Cap was down by 1.06% and BSE Small Cap was down by 0.32%. On the sectoral front, there was no gaining index; on the flip side, Metal, Capital Goods, Healthcare, Bank, IT, Oil & Gas, Realty, FMCG, Auto, Consumer Durables was losing index. Axis Bank, ITC, HCL Tech and IndusInd Bank were the top gainers on the Sensex; on the flip side, Mahindra & Mahindra, Bajaj Finance, Asian Paint and Bajaj Finserv 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
AXISBANK	973.55	955.45	1.89
ADANI PORTS	771.75	769.10	0.34
HCLTECH	1,230.85	1,229.00	0.15
POWERGRID	199.80	199.50	0.15
ITC	432.65	432.70	0.01

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
M&M	1,508.00	1,569.10	-3.89
BAJFINANCE	7,409.00	7,694.45	-3.71
ASIANPAINT	2,951.00	3,060.80	-3.59
UPL	560.50	580.15	-3.39
NESTLEIND	23,450.00	24,262.70	-3.35

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,77,80,899	1,462.45	4,082.54
ICICIBANK	2,16,93,345	910.00	1,964.66
RELIANCE	76,11,267	2,223.00	1,699.49
AXISBANK	1,75,40,495	973.55	1,696.80
KOTAKBANK	62,79,280	1,694.95	1,068.99

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	3,62,98,907	120.05	434.86
HDFCBANK	2,77,80,899	1,462.45	4082.54
ICICIBANK	2,16,93,345	910.00	1964.66
SBIN	1,94,24,825	547.00	1063.06
ITC	1,88,01,214	432.65	815.09



Indian equity markets ended lower for sixth consecutive day, with Sensex and Nifty falling below their crucial 63,200 and 18,900 marks, respectively. Investors continued to book profit in light of gloomy global set up. Sentiments were weak with rising U.S. Treasury yields and intensified fears of interest rates staying higher for longer. Besides, worsening of geo-political tension dented market sentiments. As per reports, Israel Prime Minister Benjamin Netanyahu said the country is preparing for a ground invasion of Gaza. Barring Utilities and Power, there was selling across all sectoral indices on the BSE. Markets made negative start and remained lower tracking sell-off in the global markets. Traders were worried amid rising US bond yield that may result in more fund outflows from India. The selling intensified during last hour of trade as investors maintained risk-averse approach.

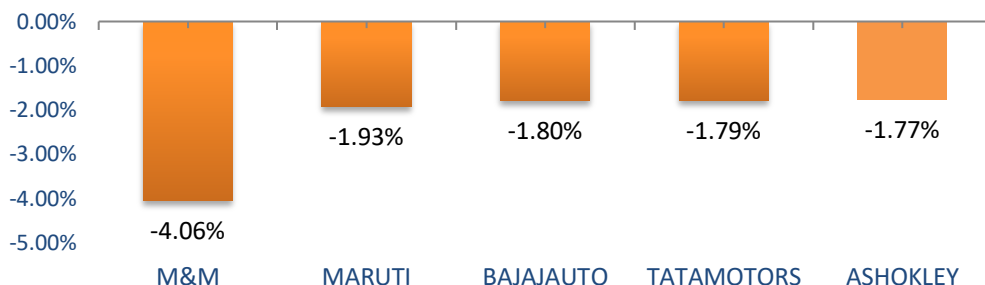
On the global front, European markets were trading lower hit by a rise in U.S. Treasury yields and a slew of weak earnings reports including from Standard Chartered in the run up to the European Central Bank's policy decision later in the day. Asian markets ended mostly in red following negative cues from the US markets overnight amid disappointing earnings reports. Back home, the Union Cabinet has approved a memorandum of cooperation (MoC) between India and Japan on a Semiconductor Supply Chain Partnership. The memorandum of cooperation between the two countries was signed in July.

Source: AceEquity

NEWS BULLETIN

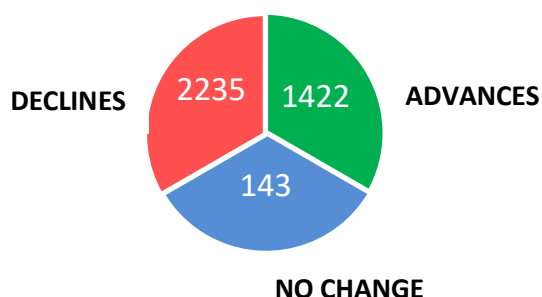
- **Ashima** has launched a Real Estate Development Project of luxurious Residential Apartments, in the name of 'The Sovereign', at Thaltej, Ahmedabad, Gujarat.
- **Wardwizard Innovations & Mobility** has signed a Memorandum of Understanding (MoU) with the Government of Gujarat to invest Rs 2,000 crore in the development of an Electric Vehicle Ancillary Cluster by 2024.
- **Infosys** has signed a five-year collaboration with automotive marquee smart Europe GmbH to refine its Direct-to-Customer (D2C) business model in Europe and provide enhanced customer experience, data-driven personalization and engagement for the existing model smart #1, the newly announced smart #3, and other upcoming all-electric models from the iconic brand.
- **Kolte Patil Developers** has received approval for the issuance of secured, rated, listed, redeemable Non-Convertible Debentures (NCDs) of face value Rs 1,00,000 each, on a private placement basis, aggregating upto Rs 113.65 crore.

MARKET DRIVING SECTOR : AUTO

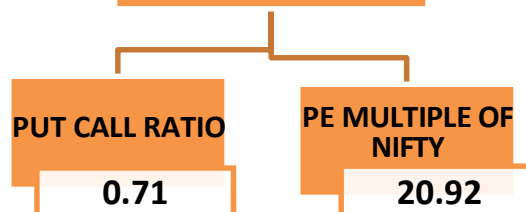


S&P BSE: AUTO
CLOSING: 36,233.68
CHANGE: -667.43
% CHANGE: -1.81%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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