

# END DAY COMMENTARY

01 Nov 2023



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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	63,874.93	63,829.87	63,896.05	63,550.46	63,591.33	-283.60	-0.44
NIFTY	19,079.60	19,064.05	19,096.05	18,973.70	18,989.15	-90.45	-0.47

## INDICES SHUT THE DAY WITH MODEST LOSSES

The 30-share BSE Sensex was down by 283.60 points or 0.44% to settle at 63,591.33 and the Nifty was down by 90.45 points or 0.47% to settle at 18,989.15. The BSE Mid-Cap was down by 0.35% and BSE Small Cap was down by 0.10%. On the sectoral front, Realty, Oil & Gas and Healthcare, were the top gaining indices; on the flip side, Metal, Consumer Durables, IT, Capital Goods, Bank, and FMCG were the top losing indices. Sunpharma, Bajaj Finserv, Reliance, SBIN and Bharti Airtel were the top gainers on the Sensex; on the flip side, Asian paint, Tata Steel, Nestle, and Maruti were the top losers on the Sensex. On global front, Asian markets shut the day on a positive note and European indices are trading on a red note.

### Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
SUNPHARMA	1,117.00	1,088.60	2.61
BPCL	357.00	349.25	2.22
HDFCLIFE	623.70	618.35	0.87
HINDALCO	462.45	459.50	0.64
TATACONSUM	904.75	900.50	0.47

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIENT	2,215.90	2,294.65	-3.43
COALINDIA	306.95	314.25	-2.32
TATASTEEL	116.15	118.75	-2.19
SBILIFE	1,338.75	1,367.85	-2.13
ADANI PORTS	769.00	784.75	-2.01

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,69,38,733	1,477.00	2,488.64
RELIANCE	51,54,595	2,294.70	1,186.51
ICICIBANK	1,29,27,203	914.45	1,180.69
LT	38,75,595	2,894.00	1,131.62
SBIN	1,35,75,575	567.30	769.94

### Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	2,47,17,941	116.15	291.10
HDFCBANK	1,69,38,733	1,477.00	2,488.6
SBIN	1,35,75,575	567.30	769.94
ICICIBANK	1,29,27,203	914.45	1,180.6
COALINDIA	95,93,653	306.95	296.93



Indian equity benchmarks ended Wednesday's trade near day's lower levels as manufacturing activities in India decelerated in October. Besides, traders were worried with eight core industries data. Investors awaited the next interest rate decision from the U.S. Federal Reserve and assessed a slew of company earnings. Markets spent their entire day in red territory, as market participants preferred to sell their riskier stocks ahead of key macroeconomic data. Metal, Power and IT stocks were witnessed selling pressure. Markets made slightly negative start and extended their losses amid sustained foreign fund outflows. Foreign institutional investors sold shares worth Rs 696.02 crore on October 31, provisional data from the National Stock Exchange showed Sentiments also got hit as the output of eight key infrastructure industries - known as the core sector - slowed to a four-month low of 8.1 per cent in September, on the back of a high base and a slowdown in seven constituent sectors. Traders ignored RBI governor Shaktikanta Das' statement that India's second-quarter gross domestic product (GDP) growth figure, in all probability, will surprise everyone on the upside.

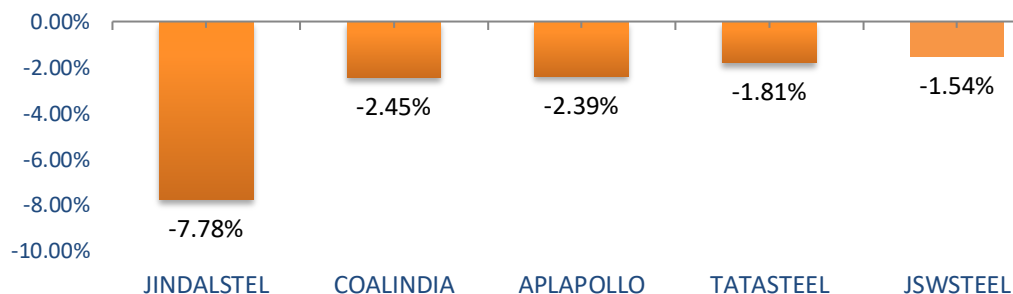
On the global front, European markets were trading mostly in green led by healthcare and retail stocks, with investors bracing for a policy decision by the Federal Reserve later in the day. Asian markets ended mostly in green with Japanese markets leading regional gains after the Bank of Japan loosened its grip on government bond yields.

Source: AceEquity

## NEWS BULLETIN

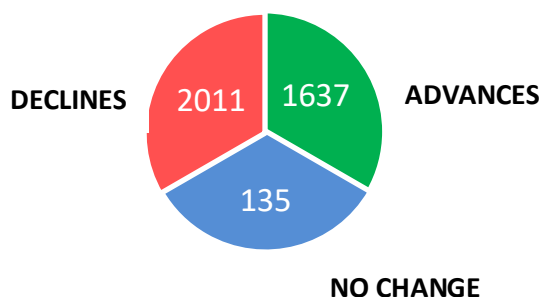
- **Ashok Leyland** has reported 13% growth in its total sales, including exports, at 16,864 units in October 2023 as compared to 14,863 units in October 2022. Light Commercial Vehicle (LCV) sales stood at 6,679 units in October 2023.
- **G R Infraprojects** has entered into Share Purchase Agreement with Aadharshila Infratech for transfer of 21% Equity shares being held by the company in its wholly owned subsidiary namely Nagaur Mukundgarh Highways (NMHPL).
- **Adani Ports and Special Economic Zone's** wholly owned subsidiary -- Adani Logistics (ALL) has subscribed 50,000 equity shares (50% stake) of Veracity Supply Chain (VSCPL) incorporated on October 31, 2023.
- **Mahindra & Mahindra's** Farm Equipment Sector (FES) has reported 3% fall in its total tractor sales (Domestic + Exports) for October 2023 at 50,460 units as against 51,994 in October 2022.

## MARKET DRIVING SECTOR : METAL

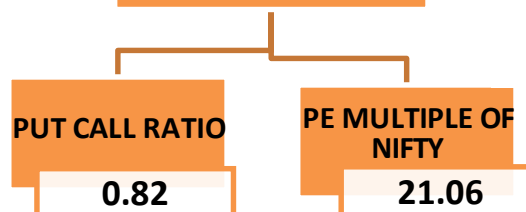


**S&P BSE: METAL**  
**CLOSING: 21,916.41**  
**CHANGE: -322.23**  
**% CHANGE: -1.45%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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