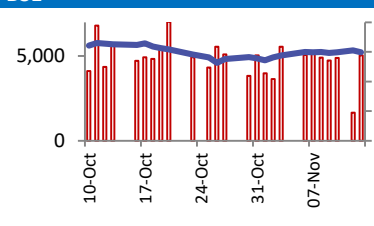
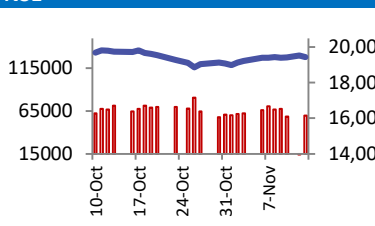


BSE		NSE																													
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World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	34828	34338	490	1.4%
Dow Futures	34942	34887	55	0.2%
Nasdaq	14094	13768	327	2.4%
FTSE	7440	7426	15	0.2%
Nikkei	33342	32696	646	2.0%
Hang Seng	17875	17397	478	2.7%
Gift Nifty	19736	19749	(13)	-0.1%
Straits Singapore	3120	3105	15	0.5%
South Korea	2483	2433	50	2.0%
Taiwan	17104	16916	188	1.1%
Shanghai	3072	3056	16	0.5%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8235	8167	68.0	0.8%
Alumin (\$/MT)	2231	2224	7.5	0.3%
Zinc (\$/MT)	2601	2553	47.5	1.9%
Brent Crude (\$/bbl)	82.7	82.5	0.3	0.3%
Gold (\$/Ounce)	1964	1964	0.2	0.0%
Silver (\$/Ounce)	23.1	23.1	0.0	0.1%
Light Crude (\$/bbl)	78.5	78.3	0.2	0.3%
N G (\$/mmbtu)	3.1	3.1	(0.0)	-0.2%
Sugar (\$/MT)	732.3	745.7	(13.4)	-1.8%
Rubber (Rs./kg)	155.0	154.5	0.5	0.3%
Baltic Dry Index	1662	1655	7.0	0.4%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.33	83.34	-0.02%
Rs./ Euro	89.07	89.01	0.07%
Rs./Chinese Yuan	11.49	11.46	0.27%
Yen /\$ rate	150.65	150.37	0.19%
\$ US/Euro	1.09	1.09	0.00%

Dollar Index	Current	Previous	Var(%)
Dollar Index	104.11	104.05	0.06%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	19400	43850
Support 2	19300	43680
Resistance	19550	44130

Securities in Ban For Trade	
CHAMBLFERT	DELTACORP
HINDCOPPER	IBULHSGFIN
MANAPPURAM	ZEEL
SAIL	

Market Review

US: The S&P 500 and Nasdaq posted their biggest daily percentage gains since April 27 on Tuesday as softer-than-expected inflation data supported the view that the Federal Reserve may be done raising interest rates.

Asia: Asian markets opened higher on Wednesday, with the MSCI Asia ex-Japan index gaining 2%.

India: On Monday, the domestic benchmark equity indices ended half a percent lower amid mixed global cues. Indian markets were shut for a holiday on November 14. **Market is expected to open gap up and likely to witness positive move during the day.**

Global Economy: The Bureau of Labor Statistics released the latest US inflation data today, revealing a decrease in the overall Consumer Price Index (CPI) to 3.3% from the previous 3.7%, while the core CPI, which excludes volatile food and energy prices, remained unchanged at 4.1%. This update comes after a notable decline from the June 2022 peak of 9.1% year-over-year to a low of 3% in June 2023, followed by a slight rebound attributed to rising energy costs and persistent core inflation components.

China's October economic activity perked up as industrial output grew at a faster pace and retail sales growth beat expectations, an encouraging sign for an economy still showing significant pockets of weakness despite a flurry of support measures. The world's second-biggest economy has struggled to mount a strong post-COVID recovery as a deepening property crisis, local government debt risks, slow global growth and geopolitical tensions have dented momentum.

Commodities: Gold prices held firm on Wednesday following a sharp rise in the last session, as data showing slowing inflation in the U.S. bolstered the view that the Federal Reserve might be done with raising interest rates.

Oil prices rose in Asian trade on Wednesday tracking optimism over cooling U.S. inflation and some positive Chinese data, with focus now turning to signs of a potential build in U.S. crude inventories.

Currency: The battered yen was stuck near a three-decade low against the dollar on Tuesday, struggling to find a floor as the Bank of Japan's (BOJ) ultra-easy monetary policy settings remained at odds with the prospect of higher-for-longer rates elsewhere.

FII Derivative Transactions (Rs. Cr)

Contracts	Purchase		Sell		Net Value	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value		Contract	Value	Contract	Value	Contract	Value
Index Future	26157	1935	17088	1319	616	235585	19364	243046	19970	(7461)	(606)
Index Option	23409185	1782339	23630714	1800684	(18345)	3819088	311248	4192346	337753	(373258)	(26505)
Stock Future	149046	10919	152354	11017	(98)	2586941	182764	2586595	182906	346	(142)
Stock Option	216717	16117	213546	15771	346	254737	18345	237694	17079	17043	1266
Total	23801105	1811310	24013702	1828791	(17481)	6896351	531721	7259681	557708	(363330)	(25987)

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
6-Nov-23	8698	8338	360
7-Nov-23	7824	8136	(312)
8-Nov-23	6790	7683	(893)
9-Nov-23	7315	8777	(1462)
10-Nov-23	12417	7089	5328
Month to date-Nov	65837	65881	-44
FII (Prov.) (Rs Cr)	Buy	Sell	Net
8-Nov-23	7467	7552	(85)
9-Nov-23	7167	8879	(1712)
10-Nov-23	6584	6845	(262)
12-Nov-23	12	202	(190)
13-Nov-23	5991	7236	(1244)
Month to date- Nov	64814	72444	(7630)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
8-Nov-23	7549	7024	524
9-Nov-23	7931	6418	1512
10-Nov-23	6239	5417	823
12-Nov-23	121	26	95
13-Nov-23	5614	4783	830
Month to date-Nov	66923	58438	8486
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
6-Nov-23	802	814	(12)
7-Nov-23	2199	707	1492
8-Nov-23	1424	248	1176
9-Nov-23	976	125	851
10-Nov-23	3229	74	3155
Month to date-Nov	19991	11582	8409

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1680	42%	924	37%
Decline	2164	54%	1505	60%
Unchanged	131	3%	79	3%

Market Turnover	13-Nov	12-Nov	Var (%)
BSE Cash	5037	1663	203%
NSE Cash	59814	14091	324%
NSE Futures	70244	14372	389%
NSE Options	31411919	3450468	810%
Total (Rs.Cr)	31547015	3480594	806%

Volatility Index	13-Nov	12-Nov
Volatility Index	11.19	11.35

Index PE - TTM	13-Nov	Yr. High	Yr. Low
Sensex	23.0	26.0	21.8
Nifty	21.0	24.2	20.0

Corporate News

Good recovery in rural markets, hopeful to grow at par with urban in next 3-4 quarters: Dabur CEO Mohit Malhotra

As inflation is coming down with the cooling of commodity prices, a "slow volume recovery" is happening in those markets, which is narrowing the difference between the growth rate between rural and urban. The recovery from the rural market is likely to continue despite a disruption in rain in some parts of the country, led by factors such as hike in MSP, good sowing of winter crops, and election season. (FE)

ONGC to start oil production from \$5 billion deep-water project this month

ONGC plans to start producing from the Cluster-2 project in KG-DWN-98/2 block this month and slowly ramp up. After several missed deadlines, ONGC has told Shapoorji Pallonji Oil & Gas (SPOG) that its floating production, storage and offloading vessel (FPSO) Armada Sterling-V should prepare to receive the first oil this month. Initial production could be 8,000 to 9,000 barrels per day. (FE)

Biocon biologics receives marketing approval by MHRA for YESAFILI in UK

This approval follows the green light granted by the European Commission (EC) for marketing authorisation in the European Union (EU) back in September. (BS)

Economy

Data Review: October Inflation

CPI inflation came in at 4.87% in Oct'23 (Bloomberg consensus: 4.8%) down from 5.02% in Sep'23. Food & beverage inflation (led by higher vegetable prices) stood at 6.24% in Oct'23 (our estimate: 5.1%), only marginally lower than 6.30% in Sep'23. Core inflation continued to moderate and stood at 4.23% in Oct'23 (estimate: 4.44%) down from 4.52% in Sep'23. WPI inflation stood at -0.5% in Oct'23 (estimate: -0.9%), down from -0.3% in Sep'23. The upside surprise was on account of higher vegetable prices. Core inflation stood at -1.3% in Oct'23 (in line with our estimate) vs. -1.2% in Sep'23. (NBIE)

International

Salesforce names Denise Dresser as new CEO of Slack

With Denise's leadership, Slack is well positioned to unlock the power of Salesforce. Dresser, an internal executive who previously ran Salesforce's accelerated industries division, will become the third person to take the helm at Slack in the past year. The platform's prior CEO, Lidiane Jones, left earlier this month to succeed Whitney Wolfe Herd as the boss of dating app Bumble. (Inv)

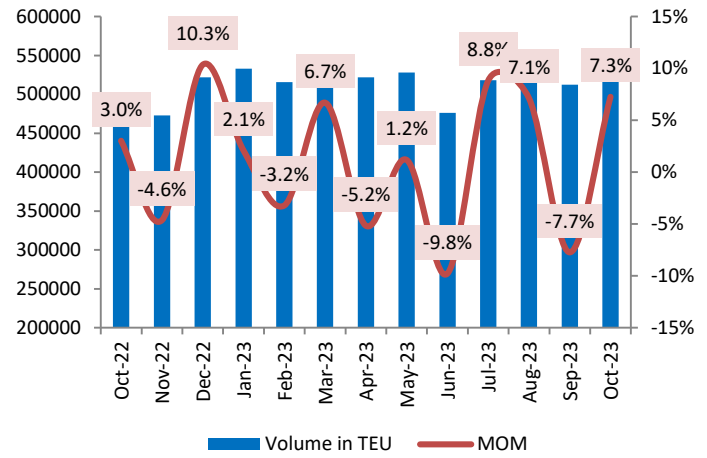
Top 5 Nifty Gainers	13-Nov	12-Nov	Var(%)
COALINDIA	349	332	5.3%
EICHERMOT	3645	3579	1.8%
HINDALCO	488	482	1.0%
M&M	1540	1526	0.9%
BPCL	387	384	0.8%
Top 5 Nifty Losers	13-Nov	12-Nov	Var(%)
SBILIFE	1328	1359	-2.2%
BAJFINANCE	7361	7457	-1.3%
INFY	1374	1388	-1.1%
APOLLOHOSP	5221	5276	-1.0%
TECHM	1131	1142	-0.9%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	64934	-0.5%	0.0%	-2.0%	5.4%
MIDCAP	32818	0.1%	1.9%	1.6%	28.8%
SMLCAP	38814	0.0%	1.9%	1.6%	33.6%
AUTO	37304	0.0%	1.9%	0.1%	24.8%
BANKEK	49656	-0.2%	0.2%	-0.2%	3.3%
Capital Goods	47960	-0.1%	2.0%	0.1%	44.5%
FMCG	18841	-0.4%	-0.1%	-0.9%	17.8%
Health Care	28887	-0.5%	1.8%	2.1%	21.4%
IT	31306	-0.8%	-0.9%	-2.8%	4.5%
METAL	23526	1.2%	3.6%	1.4%	15.1%
Oil & Gas	19249	-0.2%	0.4%	1.6%	-3.6%
Power	4617	0.2%	2.0%	1.7%	-4.3%
Realty	5254	-0.3%	3.0%	7.5%	45.6%

NSE USD Futures	13-Nov	12-Nov	Var (%)
Nov Expiry (Rs./\$)	83.32	83.34	0.0%
Dec Expiry (Rs./\$)	83.32	83.34	0.0%
Total Turnover (Rs. Crore)	15091	1026	1371%

Sectors	TTM PE
Auto	28.12
Auto Ancillary	39.49
Banking	14.52
Engineering	39.67
Cement	77.21
Diamonds & Jewellery	38.3
Housing Finance	19.65
Infrastructure & Const	28.37
Metals-Aluminium	34.68
Metal - Steel	15.57
Oil Expl.	13.28
Pharma	8.88
Power – Gen. Supp.	41.85
Information Tech.	14.56
Sugar	15.12
Telecom Serv. Prov.	25.86
Tyres	28.67

JNPT Port Volume (in Teu) (Source: JNPT)



10 year G-Sec Yield	Current	Previous	Change
US	4.65%	4.65%	0 bps
Japan	0.88%	0.85%	3 bps
India	7.30%	7.28%	2 bps
UK	4.34%	4.27%	6 bps
Libor 3 Mths	5.64%	5.63%	1 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation – WPI	-0.52%	-0.26%	(26) bps
Inflation – CPI	4.87%	5.02%	(15) bps

India GDP	Q4FY23	Q4FY22	Var(%)
Growth	8.00%	6.06%	194 bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.50%	6.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.50%	4.50%	0 bps
O/S Banking System Liquidity (Rs bn)	-126	-67	(59.3)

IIP Growth %	Sep-23	Sep-22	YTD
IIP	5.8	3.3	5.5
Mining	7.4	11.4	8.0
Manufacturing	4.5	2.0	5.1
Electricity	9.9	11.6	6.7

ADR Price Movement

Company	Price (US\$)	Volume	Previous Day Price	Volume	Variance (%)	No. of Share Per ADR	ADR Price (Rs.)	BSE Price	Variance (%)
Infosys Tech	16.92	6902246	16.55	4579812	2.24%	1	1409.94	1373.55	2.6%
Wipro	4.61	1336048	4.52	1203155	1.99%	1	384.15	381.65	0.7%
Dr.Reddy's	65.27	211406	64.92	188808	0.54%	1	5438.95	5419.85	0.4%
ICICI Bank	22.67	8294903	22.39	3552221	1.25%	2	944.55	934.45	1.1%
HDFC Bank	58.70	2432071	57.18	1861299	2.66%	3	1630.49	1488.80	9.5%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	37.30	36.60	0.7	1.9%
RIL	57.00	55.90	1.1	2.0%
SBI	70.70	69.60	1.1	1.6%

US Economy Data	Current	Previous
Inflation (%) (YoY)	3.20%	3.70%
Unemployment (%)	3.90%	3.80%

Interest Rate (%)	Current	Previous
Fed Rate	5.50%	5.50%

US GDP	Q3CY23	Q2CY23	Q4CY22
Growth (QoQ Annualized)	4.90%	2.10%	2.60%

China Economy Data	Current	Previous
GDP	4.90%	6.30%
Inflation – CPI (%)	-0.20%	0.00%

Economic Calendar	Date
Indian GDP Data	30 Nov
Indian Inflation Data CPI	12 Dec
Indian Inflation Data WPI	14 Dec
Indian Monetary Policy	8 Dec
India's Industrial Production (IIP)	12 Dec
US Inflation Data	To be announced
US GDP	29 Nov
US Unemployment Data	8 Dec
US Fed Rate	14 Dec
China GDP	16 Jan
China Inflation Data	09 Dec

Event Update

Name	Date	Purpose
CFF Fluid Control Ltd.	15-11-2023	Rs.0.50 per share(5%)Interim Dividend
Chambal Fertilisers and Chemicals Ltd.	15-11-2023	Rs.4.50 per share(45%)Interim Dividend
Emami Ltd.	15-11-2023	Rs.4.00 per share(400%)First Interim Dividend
Indian Toners & Developers Ltd.	15-11-2023	Rs.4.50 per share(45%)Interim Dividend
Indraprastha Gas Ltd.	15-11-2023	Rs.4.00 per share(200%)Interim Dividend
PDS Ltd.	15-11-2023	Rs.1.60 per share(80%)Interim Dividend
Sat Industries Ltd.	15-11-2023	Rs.0.15 per share(7.5%)Interim Dividend
Steelcast Ltd.	15-11-2023	Rs.1.35 per share(27%)Interim Dividend
Bayer CropScience Ltd.	16-11-2023	Rs.105.00 per share(1050%)Interim Dividend
Cigniti Technologies Ltd.	16-11-2023	Rs.3.00 per share(30%)Interim Dividend
Container Corporation Of India Ltd.	16-11-2023	Rs.3.00 per share(60%)Second Interim Dividend
MSTC Ltd.	16-11-2023	Rs.5.50 per share(55%)Interim Dividend
Power Grid Corporation Of India Ltd.	16-11-2023	Rs.4.00 per share(40%)Interim Dividend
Saksoft Ltd.	16-11-2023	Rs.0.40 per share(40%)Interim Dividend
Sundram Fasteners Ltd.	16-11-2023	Rs.2.68 per share(268%)Interim Dividend
Archean Chemical Industries Ltd.	17-11-2023	Rs.1.00 per share(50%)Interim Dividend
Bhagiradha Chemicals & Industries Ltd.	17-11-2023	First Interim Dividend
Computer Age Management Services Ltd.	17-11-2023	Rs.10.00 per share(100%)Interim Dividend
Crown Lifters Ltd.	17-11-2023	Dividend
Gabriel India Ltd.	17-11-2023	Rs.1.50 per share(150%)Interim Dividend
IFL Enterprises Ltd.	17-11-2023	Rs.0.0001 per share(0.01%)Interim Dividend
Indian Railway Catering And Tourism Corporation Ltd.	17-11-2023	Rs.2.50 per share(125%)Interim Dividend

Bulk Deal As On 13/11/23

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
511463	ALEXANDER	TEJESH HASMUKH SHAH	S	114647	14.91
539277	ALSTONE	PASCHIM FINANCE AND CHIT FUND PVT LTD	S	8717891	0.61
539277	ALSTONE	PELICON FINANCE AND LEASING LIMITED	S	10000000	0.62
539277	ALSTONE	VICTORY SOFTWARE PRIVATE LIMITED	S	7800000	0.61
531252	ANERI	RUCHIRA GOYAL	B	21431	4.68
531252	ANERI	VIJAYA BHASKAR APPAPURAPU	S	20003	4.68
522005	AUSTENG	MEENU GOEL	S	25552	168.05
542934	CBPL	MIHIR JAIN	B	45000	101.25
542934	CBPL	RICHA PARWAL	S	45000	101.25
543516	DHYAANI	DHIRAJLAL SHIVABHAI VEKARIYA	B	10000	79.5
543516	DHYAANI	GIRIRAJ STOCK BROKING PRIVATE LIMITED	S	9000	79.3
543516	DHYAANI	GIRIRAJ STOCK BROKING PRIVATE LIMITED	B	4000	78.5
539697	HILIKS	ANAND SHANKARRAO UTTURE	B	32500	31.52
539697	HILIKS	YATHIRAJAM MADHUSESHU (HUF)	S	27800	31.52
543544	JAYANT	ANBUCHZHIAN	S	49500	81.47
544015	MISHDESIGN	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	40000	129.47
544015	MISHDESIGN	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	31000	126.79
544015	MISHDESIGN	NIKUNJ STOCK BROKERS LIMITED	S	78000	128.71
544015	MISHDESIGN	RAMNATHAN BHARAT KADAYAM	B	15000	129.99
544015	MISHDESIGN	SASMEETA SRIVASTAVA	B	15000	129.69
544015	MISHDESIGN	SUBHASH S JOGANI HUF	B	25000	129.97
544015	MISHDESIGN	VIJAY MANGILAL NAGORI	B	20000	129.78
540809	MRCAGRO	JNSP TRADING LLP	S	64886	12
532676	PBAINFRA	SECURE SHANTI ADVISORY LLP	B	68887	14.7
543540	PGCRL	AZMAT TRADERS LLP	B	13800	294.95
544021	PROTEAN	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRIVATE LIMITED	S	235292	846.27
544021	PROTEAN	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRIVATE LIMITED	B	235292	842.97
544021	PROTEAN	NK SECURITIES RESEARCH PVT. LTD.	S	478166	833.95
544021	PROTEAN	NK SECURITIES RESEARCH PVT. LTD.	B	478166	833.37
504903	RATHIST	TOPGAIN FINANCE PRIVATE LIMITED	B	459046	27.15
539435	RFSL	AMIT SINGH	S	25000	11.63
539435	RFSL	KANTA DEVI SAMDARIA	B	25000	11.63
512115	ROSEMER	PRAVEEN ARORA	B	23388	60.95
537392	TAAZAIN	PONNURU SIVA RATNA MAHA LAKSHMI PRASANNA	S	91000	9.97
532035	UNISTRMU	MITAL RITESH VASNAWALA	B	173900	14.34
532035	UNISTRMU	RITESH JITENDRA VASNAWALA	B	175006	14.27
539097	URSUGAR	SUJATA AJAY PANDEY	S	327621	13.29
539291	VASUDHAGAM	SURESHVANGAPANDU	B	28064	14.41
541735	VIVANTA	RAMESH KUMAR	S	850000	4.18
513713	WHITEORG	JR SEAMLESS PRIVATE LIMITED	B	484712	9.49
511018	ZMILGFN	SHRENI CONSTRUCTION PRIVATE LIMITED	S	15547	43
511018	ZMILGFN	SHRENI CONSTRUCTION PRIVATE LIMITED	B	1599	44.41

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
BURNPUR	Burnpur Cement Limited	JAINAM BROKING LIMITED	BUY	538834	7.62
GODHA	Godha Cabcon Insulat Ltd	ANKITA VISHAL SHAH	BUY	5000000	0.6
GODHA	Godha Cabcon Insulat Ltd	NITIN BAKSHI	SELL	3912100	0.6
MAITREYA	Maitreya Medicare Limited	SAHIL GUPTA	BUY	49600	131.25
MSPL	MSP Steel & Power Ltd.	STATE BANK OF INDIA	SELL	1929977	18.53
NUVAMA	Nuv ama Wealth Manage Ltr	THE PABRAI INVESTMENT FUND IV LP	SELL	180187	2785.17
SARTELE	Sar Tele venture Limited	MANSI SHARE AND STOCK ADVISORS PVT LTD	SELL	106000	97.14
SWANENERGY	Swan Energy Limited	2I CAPITAL PCC	SELL	2000000	427.81
SWANENERGY	Swan Energy Limited	MONTEGO REALITY PRIVATE LIMITED	SELL	2338403	432.06
TRANSTEEL	Transteeel Seating Tech L	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	132000	101.78
CLOUDPP	Var Cld Ltd Rs.2.5 ppd up	MANSI SHARE AND STOCK ADVISORS PVT LTD	SELL	24000	52.65
VINEETLAB	Vineet Laboratories Ltd	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED .	BUY	70000	67.95

Disclosure:

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