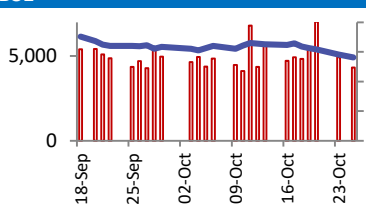
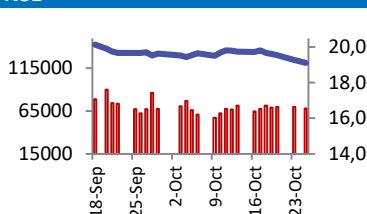


BSE		NSE																													
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World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	33036	33141	(105)	-0.3%
Dow Futures	33066	33150	(84)	-0.3%
Nasdaq	12821	13140	(319)	-2.4%
FTSE	7414	7390	25	0.3%
Nikkei	30602	31270	(667)	-2.1%
Hang Seng	16951	17085	(134)	-0.8%
Gift Nifty	19102	19177	(75)	-0.4%
Straits Singapore	3058	3079	(21)	-0.7%
South Korea	2314	2363	(49)	-2.1%
Taiwan	16096	16359	(263)	-1.6%
Shanghai	2965	2974	(9)	-0.3%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8032	8052	(19.5)	-0.2%
Alumin (\$/MT)	2219	2191	28.0	1.3%
Zinc (\$/MT)	2480	2443	37.5	1.5%
Brent Crude (\$/bbl)	89.9	90.1	(0.2)	-0.2%
Gold (\$/Ounce)	1985	1980	5.2	0.3%
Silver (\$/Ounce)	22.9	22.9	0.0	0.1%
Light Crude (\$/bbl)	85.3	85.4	(0.1)	-0.1%
N G (\$/mmbtu)	3.0	3.0	(0.0)	-0.2%
Sugar (\$/MT)	746.6	745.5	1.1	0.1%
Rubber (Rs./kg)	152.0	152.0	0.0	0.0%
Baltic Dry Index	1832	1949	(117.0)	-6.0%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.19	83.19	0.00%
Rs./ Euro	87.92	88.12	-0.22%
Rs./Chinese Yuan	11.37	11.37	-0.01%
Yen /\$ rate	150.40	150.23	0.11%
\$ US/Euro	1.05	1.06	-0.17%

Dollar Index	Current	Previous	Var(%)
Dollar Index	106.72	106.53	0.18%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	19000	42580
Support 2	18900	42340
Resistance	19270	43220

Securities in Ban For Trade	
RBLBANK	DELTACORP

Market Review

US: US dragged by rising Treasury yields and disappointing set of corporate earnings.

Asia: Asian markets traded lower tracking overnight losses in the US stocks.

India: The domestic indices ended in the negative territory for the fifth consecutive session on Wednesday amid concerns over the ongoing Israel-Hamas war while unimpressive Q2 earnings and gains in US Treasury yields also weighed on sentiment.

Market is expected to open gap down and likely to witness selling pressure during the day.

Global Economy: Sales of new U.S. single-family homes surged to a 19-month high in September as the annual median house price dropped by the most since 2009 amid discounts offered by builders to woo buyers, but mortgage rates flirting with 8% could curb demand. A chronic shortage of previously owned houses is driving buyers to new construction, a situation that builders are taking advantage of by giving a range of incentives to improve affordability.

Hong Kong will slash stamp duties for property buyers to help boost its struggling real estate sector, while reducing levies on stock trades in a bid to kick start economic activity in the Asian financial hub. This is the first time property cooling measures in a variety of stamp duties known as "spicy policies" will be relaxed. They were first introduced in 2010 to curb red-hot property prices in a low interest rate environment.

Commodities: Gold prices edged up on Thursday as the Middle-East conflict kept investors worried, with bullion standing firm despite a stronger U.S. dollar and bonds yields.

Oil prices were little changed on Thursday as the market weighed mixed drivers, eyeing tensions in the Middle East while digesting a rise in US crude stockpiles.

Currency: The dollar was firm on Thursday, hovering near a one-week high as Treasury yields rose and investor appetite for riskier currencies dimmed, while the yen breached 150 per dollar to keep traders jittery about the prospect of intervention.

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	103469	8459	105277	8611	(152)	194442	15671	189554	15118	4888	553
Index Option	20804800	1571389	20425406	1541199	30190	5243279	416697	4273793	340517	969486	76180
Stock Future	817271	62768	789645	60613	2155	2394605	182556	2433997	186718	(39392)	(4162)
Stock Option	149461	12008	157878	12762	(754)	157336	12328	195189	15493	(37853)	(3165)
Total	21875001	1654624	21478206	1623185	31439	7989662	627252	7092533	557846	897129	69406

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
17-Oct-23	8808	8217	591
18-Oct-23	9562	11552	(1990)
19-Oct-23	10243	11195	(952)
20-Oct-23	14940	13138	1802
23-Oct-23	14940	13138	1802
Month to date-Oct	102938	109274	-6336
FII (Prov.) (Rs Cr)	Buy	Sell	Net
18-Oct-23	9761	11593	(1832)
19-Oct-23	10102	11196	(1093)
20-Oct-23	13646	13189	456
23-Oct-23	8230	7978	252
25-Oct-23	9076	13312	(4237)
Month to date- Oct	147506	166673	(19167)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
18-Oct-23	8167	6697	1470
19-Oct-23	7250	6514	736
20-Oct-23	6871	6862	9
23-Oct-23	8023	6911	1112
25-Oct-23	9639	6069	3569
Month to date-Oct	128966	109253	19713
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
17-Oct-23	393	245	149
18-Oct-23	715	325	389
19-Oct-23	850	866	(16)
20-Oct-23	830	167	663
23-Oct-23	141	271	(129)
Month to date-Oct	12531	7997	4534

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1140	30%	693	28%
Decline	2551	67%	1737	70%
Unchanged	104	3%	54	2%

Market Turnover	25-Oct	23-Oct	Var (%)
BSE Cash	4331	4935	-12%
NSE Cash	68056	69968	-3%
NSE Futures	263185	268471	-2%
NSE Options	33667310	33867877	-1%
Total (Rs.Cr)	34002883	34211250	-1%

Volatility Index	25-Oct	23-Oct
Volatility Index	11.31	10.91

Index PE - TTM	25-Oct	Yr. High	Yr. Low
Sensex	22.6	26.0	21.8
Nifty	21.7	24.2	20.0

Corporate News

TVS to collaborate with S'pore based startup in Indonesia

TVS Motor Company has announced a strategic collaboration with Singapore-based technology startup ION Mobility for the sports scooter market through Project Dynamo in Indonesia. (TOI)

Apollo Micro Systems entered into a term loan agreement

Apollo Micro Systems has entered into a term loan agreement with Bajaj Finance to avail credit facilities up to Rs 15 crore to incur capex for research and development. (MC)

Karnataka Bank has entered into a partnership agreement with Vakrangee Limited

Karnataka Bank has entered into a partnership agreement with VL enabling Business Correspondent Banking services for the Bank through. Vakrangee Kendra outlets across 'Pan India'. Vakrangee has emerged as one of the leading financial inclusion players with more than 14,000 Banking BC points and 4th largest ATM operator in Rural India with more than 6,300+ ATMs. (BL)

Economy

Rabi season fertiliser subsidy of Rs 22,000 crore gets nod

The Union cabinet has approved nutrient-based fertiliser subsidy rates for the rabi season 2023-24, with an outlay of ₹22,303 crore. This move aims to ensure that farmers can access soil nutrients at reasonable rates despite high global prices. The subsidy rates for nitrogen-based fertiliser, phosphorus, potash, and sulphur have been announced. These rates are lower than those during the kharif season due to the rationalisation of subsidies based on recent international price trends. The government aims to provide fertilizers to farmers at last year's rate. (ET)

International

Ford, UAW reach tentative deal to end strike including record pay raise

The United Auto Workers union reached a tentative labor deal on Wednesday with Ford Motor, the first of Detroit's Big Three car manufacturers to negotiate a settlement to strikes joined by 45,000 workers since mid-September. The proposed accord, which UAW's leadership must still approve, provides a 25% wage hike over the 4-1/2-year contract, starting with an initial increase of 11%. (Inv)

Top 5 Nifty Gainers	25-Oct	23-Oct	Var(%)
COALINDIA	310	306	1.4%
TATASTEEL	121	120	1.1%
HINDALCO	461	457	1.0%
TATACONSUM	890	883	0.8%
SBIN	556	553	0.6%
Top 5 Nifty Losers	25-Oct	23-Oct	Var(%)
INFY	1370	1409	-2.7%
ADANIENT	2257	2309	-2.2%
CIPLA	1157	1184	-2.2%
APOLLOHOSP	4860	4970	-2.2%
NTPC	232	237	-1.9%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	64049	-0.8%	-3.6%	-2.9%	7.6%
MIDCAP	30920	-0.5%	-4.9%	-3.6%	23.5%
SMLCAP	36322	-0.8%	-5.9%	-2.4%	26.3%
AUTO	36901	-0.3%	-1.5%	0.0%	24.3%
BANKEK	48173	-0.7%	-3.6%	-3.9%	2.2%
Capital Goods	45605	-1.1%	-5.1%	-2.3%	40.0%
FMCG	18462	-0.4%	-3.2%	-1.6%	15.5%
Health Care	27318	-0.7%	-3.3%	-1.6%	15.7%
IT	30903	-1.1%	-4.2%	-5.2%	6.8%
METAL	22460	0.8%	-5.1%	-1.5%	20.1%
Oil & Gas	18129	-0.6%	-5.3%	-4.6%	-3.8%
Power	4304	-1.1%	-6.2%	-7.0%	-9.1%
Realty	4604	-0.8%	-5.4%	0.6%	35.9%

NSE USD Futures	25-Oct	23-Oct	Var (%)
Oct Expiry (Rs./\$)	83.18	83.18	0.0%
Nov Expiry (Rs./\$)	83.19	83.19	0.0%
Total Turnover (Rs. Crore)	33522	21289	57%

Sectors	TTM PE
Auto	32.89
Auto Ancillary	42.69
Banking	14.86
Engineering	43.6
Cement	77.1
Diamonds & Jewellery	38.57
Housing Finance	20.42
Infrastructure & Const	28.84
Metals-Aluminium	35.72
Metal - Steel	13.11
Oil Expl.	14.61
Pharma	7.77
Power – Gen. Supp.	40.77
Information Tech.	15.83
Sugar	11.36
Telecom Serv. Prov.	157.43
Tyres	33.17

Benzene FOB Price (\$/MT) (Source: BBG)



10 year G-Sec Yield	Current	Previous	Change
US	4.95%	4.95%	(0) bps
Japan	0.88%	0.86%	2 bps
India	7.34%	7.38%	(4) bps
UK	4.61%	4.54%	7 bps
Libor 3 Mths	5.64%	5.64%	0 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation – WPI	-0.26%	-0.52%	26 bps
Inflation – CPI	5.02%	6.83%	(181) 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)	-1118	-1072	(45.8)

IIP Growth %	Aug-23	Aug-22	YTD
IIP	10.3	-0.7	5.7
Mining	12.3	-3.9	8.3
Manufacturing	9.3	-0.5	5.2
Electricity	15.3	1.4	7.0

Bulk Deal As On 25/10/23

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
530881	ABVL	JHANSI SANIVARAPU	B	14000	184
530881	ABVL	MADHUKAR SHETH	S	23200	183.57
530881	ABVL	PAVANKUMAR DONEPUDI	S	19129	180.12
530881	ABVL	SAI DEEPA ROCK DRILLS PVT LTD	S	11000	182.08
530881	ABVL	SREEDAR REDDY GUDAPU REDDY	B	37000	181.52
540718	AKM	AJAYSINH PRAVINSINH DEVDA	B	42000	49.59
540718	AKM	BHARATBHAI PARSOTTAMBHAI SONI	S	39000	49.67
540718	AKM	MAHAVIR RAMESHCHANDRA CHUDASAMA	S	21000	49.61
540718	AKM	MITHLESH CONSULTANCY LLP	B	21000	49.74
540718	AKM	PARAMAR VAISHNAVIBEN	S	27000	49.6
531381	ARIHANT	ANAND SINGHI	S	70000	70.14
530457	CINERAD	DEV DUTTASHITPARIKH	B	27151	5.61
530457	CINERAD	HAL CLYDE DENISON LIMITED	S	27000	5.61
531909	CROISSANCE	SERA INVESTMENTS & FINANCE INDIA LIMITED	S	500000	3.91
540361	DANUBE	NITYANAND KUMAWAT	B	368036	10.85
540361	DANUBE	RUBEINA FARHAN MITHIBORWALA	S	321979	10.87
514010	HIMFIBP	ANISHA FINCAP CONSULTANTS LLP	B	4005546	15.58
514010	HIMFIBP	BRJESHWARI TEXTILES PRIVATE LIMITED	S	4000000	15.58
540377	IFL	CHANDAN CHAURASIYA	B	1204385	7.96
540377	IFL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	1539045	7.96
543286	JETMALL	ROOPAL SHREYANS LODHA	S	36000	23
541337	MILEFUR	SMITA SHEKHAR MIRGUNDE	S	51000	6.2
543997	ORGANICREC	VINOD SOMANI	S	40800	235.92
511557	PROFINC	SHRENI CONSTRUCTION PRIVATE LIMITED	B	1175000	1.2
543366	SBLI	KATYAYANI TRADELINK PRIVATE LIMITED	B	4800	57.74
543366	SBLI	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	S	7200	56
543366	SBLI	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	B	9600	55.89
540147	SHASHIJIT	MAHADEV MANUBHAI MAKVANA	S	147500	44.18
540147	SHASHIJIT	MAHADEV MANUBHAI MAKVANA	B	167500	42.97
540072	SHIVAEXPO	ABHINAV UPADHYAY	S	200000	10.05
540072	SHIVAEXPO	ISHWIN KHARBANDA	B	90000	10.06
511447	SYLPH	DEEPALI AGGARWAL	B	1000000	3.35
538464	TPROJECT	DHWANIL SAUMILBHAI BHAVNAGARI	B	265000	3.65
538464	TPROJECT	SHASHIKANT CHINUBHAI KAPADIA	S	165000	3.65
542765	TRANSPACT	PRADEEPPARG	S	2000	285.25
542765	TRANSPACT	YELLOWSTONE VENTURES LLP	B	2000	285.25

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AARTECH	Aartech Solonics Limited	KABRA KAILASH	SELL	70000	143.95
AARTECH	Aartech Solonics Limited	VEENA RAJESH SHAH	BUY	70000	143.95
ABFRL	Aditya Birla Fas & Rt Ltd	CRESTA FUND LTD	BUY	9733098	212.5
ABFRL	Aditya Birla Fas & Rt Ltd	CRESTA FUND LTD	BUY	9733098	212.5
ABFRL	Aditya Birla Fas & Rt Ltd	GRIFFIN GROWTH FUND VCC	SELL	9733098	212.5
ABFRL	Aditya Birla Fas & Rt Ltd	GRIFFIN GROWTH FUND VCC	SELL	9733098	212.5
ACSAL	Arvind and Company	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	180000	80
ACSAL	Arvind and Company	SATYA VIBHU MUPPANA	BUY	78000	77.77
ACSAL	Arvind and Company	SPREAD X SECURITIES PRIVATE LIMITED	SELL	159000	76.72
CANARYS	Canarys Automations Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	288000	42.99
CMRSL	Cyber Media Res & Ser Ltd	MEGHRAJ JAIN SHIKAR	SELL	23200	109.08
IBULHSGFIN	Indiabulls Hsg Fin Ltd	CAPRI GLOBAL HOLDINGS PRIVATE LIMITED	SELL	2537000	157.8
ISFT	Intrasoft Tech. Ltd	DINDAYAL BUBNA	SELL	102965	127.09
ISFT	Intrasoft Tech. Ltd	SALSET VINIMAY PVT.LTD.	BUY	100000	127
SWANENERGY	Swan Energy Limited	MALBERRY INFRASTRUCTURE PRIVATE LIMITED	SELL	2072501	300.08
SWANENERGY	Swan Energy Limited	TIRUPATI AGENCIES PRIVATE LIMITED	SELL	5175720	300.19
CLOUD	Varanium Cloud Limited	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED .	SELL	270000	145
VISHNUINFR	Vishnusurya Proj N Infr L	BHATIA SURESH HUF	BUY	126000	118.16

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