

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	33002	33433	(431)	-1.3%
Dow Futures	33122	33201	(79)	-0.2%
Nasdaq	13059	13308	(248)	-1.9%
FTSE	7470	7511	(41)	-0.5%
Nikkei	30635	31238	(603)	-1.9%
Hang Seng	17168	17331	(163)	-0.9%
Gift Nifty	19439	19450	(11)	-0.1%
Straits Singapore	3156	3192	(37)	-1.1%
South Korea	2411	2411	Closed	Closed
Taiwan	16264	16454	(190)	-1.2%
Shanghai	3110	3110	Closed	Closed

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8007	8053	(46.5)	-0.6%
Alumin (\$/MT)	2290	2321	(31.0)	-1.3%
Zinc (\$/MT)	2502	2601	(98.5)	-3.8%
Brent Crude (\$/bbl)	90.9	90.9	(0.1)	-0.1%
Gold (\$/Ounce)	1820	1823	(2.8)	-0.2%
Silver (\$/Ounce)	21.0	21.2	(0.1)	-0.7%
Light Crude (\$/bbl)	89.2	89.2	(0.0)	0.0%
N G (\$/mmbtu)	2.9	2.9	(0.0)	-0.1%
Sugar (\$/MT)	689.1	701.7	(12.6)	-1.8%
Rubber (Rs./kg)	147.0	146.0	1.0	0.7%
Baltic Dry Index	1780	1737	43.0	2.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.21	83.04	0.20%
Rs./ Euro	87.24	88.15	-1.04%
Rs./Chinese Yuan	11.41	11.41	-0.02%
Yen /\$ rate	149.29	149.02	0.18%
\$ US/Euro	1.05	1.05	-0.07%

Dollar Index	Current	Previous	Var(%)
Dollar Index	107.12	107.00	0.12%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	19450	44350
Support 2	19370	44000
Resistance	19600	44750

Securities in Ban For Trade	
IBULHSGFIN	

Market Review

US: The US stock market indices ended sharply lower on Tuesday as fresh economic data raised bets that the US Federal Reserve may need to keep interest rates higher for longer.

Asia: Asian shares slumped, tracking U.S. peers lower after employment data bolstered the case for the Federal Reserve to keep interest rates elevated and pushed up Treasury yields.

India: India's benchmark stock indices closed lower on Tuesday, dragged by losses in index heavyweights HDFC Bank Ltd. and Reliance Industries Ltd. Auto, oil and gas, and pharma sectors declined, while public sector banks and media advanced.

Market is expected to witness selling pressure during the day.

Global Economy: Top global automakers on Tuesday reported a rise in U.S. new vehicle sales for the third quarter, buoyed by resilient demand for latest models and improved supplies. EV sales jumped 28% in the third quarter from the preceding quarter. Overall, U.S. new vehicle sales in September were 1.33 million units, with an annual sales rate of 15.67 million units. The robust performance comes against the backdrop of the ongoing coordinated strike from the United Auto Workers (UAW) union against the Detroit Three automakers that has sparked concerns over supply disruptions in the current quarter.

South Korea's factory activity shrank in September at the mildest pace in 15 months, as the decline in output and orders softened, providing hopeful signs for a turn in economic fortunes. The purchasing managers index (PMI) for South Korean manufacturers, stood at 49.9 in September on a seasonally adjusted basis, up from 48.9 in August.

Commodities: Gold prices were flat on Wednesday near seven-month lows hit in the previous session, as a surge in U.S. dollar and bond yields buoyed by strong jobs data meant that there was room for a further monetary policy tightening.

Oil rose in early Asian trade on Wednesday, supported by tightening global crude supply ahead of a panel meeting of OPEC+ ministers.

Currency: The dollar initially rose but later fell sharply against the yen after breaching the key 150 level for first time since October 2022, leading some to suspect intervention by Japanese monetary officials to halt the yen's fall.

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	27424	2324	48012	4164	(1840)	165567	13674	147633	12110	17934	1564
Index Option	16486933	1296512	16355781	1288630	7882	3935754	315339	3001849	248231	933905	67108
Stock Future	163150	13391	189876	15284	(1893)	2360320	186382	2376674	188299	(16354)	(1917)
Stock Option	203177	16991	205242	17163	(172)	128720	10523	105545	8554	23175	1969
Total	16880684	1329218	16798911	1325241	3977	6590361	525918	5631701	457194	958660	68724

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
22-Sep-23	10990	12156	(1165)
25-Sep-23	9199	10585	(1387)
26-Sep-23	9406	9269	138
27-Sep-23	9975	12164	(2189)
28-Sep-23	24635	27503	(2868)
Month to date-Sept	214572	230598	-16026
FII (Prov.) (Rs Cr)	Buy	Sell	Net
26-Sep-23	8751	9444	(693)
27-Sep-23	9575	9930	(354)
28-Sep-23	10711	14076	(3364)
29-Sep-23	10058	11744	(1686)
3-Oct-23	9715	11749	(2034)
Month to date- Oct	9715	11749	(2034)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
26-Sep-23	7502	6788	715
27-Sep-23	8420	8033	386
28-Sep-23	15118	12407	2711
29-Sep-23	8789	6037	2751
3-Oct-23	9223	7862	1361
Month to date-Oct	9223	7862	1361
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
22-Sep-23	1394	1027	367
25-Sep-23	521	458	63
26-Sep-23	1005	556	449
27-Sep-23	945	1180	(235)
28-Sep-23	2161	1301	860
Month to date-Sept	16091	14462	1629

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1872	47%	1114	44%
Decline	1905	48%	1327	52%
Unchanged	179	5%	98	4%

Market Turnover	03-Oct	29-Sep	Var (%)
BSE Cash	4652	4969	-6%
NSE Cash	70370	67562	4%
NSE Futures	82424	101310	-19%
NSE Options	31344732	19311061	62%
Total (Rs.Cr)	31502178	19484903	62%

Volatility Index	03-Oct	29-Sep
Volatility Index	11.79	11.45

Index PE - TTM	03-Oct	Yr. High	Yr. Low
Sensex	24.0	26.0	21.8
Nifty	22.1	24.2	20.0

Corporate News

ICICI Bank raises Rs 4,000 crore through bonds to fund business growth

ICICI Bank raised Rs 4,000 crore via bonds to fund business growth. The bank has allotted 4,00,000 senior unsecured redeemable long-term bonds in the nature of non-convertible debentures aggregating to Rs 4,000 crore on private placement basis and the date of allotment being October 3, 2023.(BS)

Abu Dhabi-based IHC raises stake in Adani Enterprises to over 5%

Days after selling its stake in two of the Adani Group companies, Abu Dhabi-based conglomerate International Holding Company (IHC) has raised its stake in the group's flagship Adani Enterprises Ltd to above 5%. IHC said, "This strategic increase reflects IHC's conviction in the world leading incubation model of AEL."(MC)

In major rejig, HDFC Bank splits retail loans division

HDFC Bank chief executive Sashidhar Jagdishan has split retail loans into mortgage and non-mortgage segments, with two group heads and two regional heads for branch banking, which would be pivotal for liability growth - a key investor metric for the biggest Nifty constituent by weighting. (ET)

Economy

Power consumption grows 10.7 pc to 140.49 billion units in September

The peak power demand met -- the highest supply in a day -- rose to 239.97 GW in September. The peak power supply stood at 199.50 GW in September 2022 and 180.73 GW in September 2021. The power ministry had estimated the country's electricity demand to touch 229 GW during summer. The demand did not reach the projected level in April-July due to unseasonal rain. (ET)

International

Zoom enters document management market with AI-driven 'Zoom Docs'

Zoom Video Communications, has launched 'Zoom Docs', an artificial intelligence (AI)-driven document management tool. The announcement was made at the firm's annual conference, aiming to enhance its platform amid post-lockdown office returns and stiff competition from tech giants Microsoft and Google. (Inv)

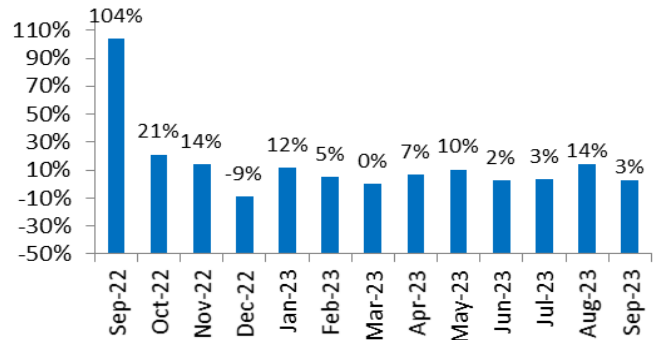
Top 5 Nifty Gainers	03-Oct	29-Sep	Var(%)
BAJFINANCE	7968	7811	2.0%
LT	3073	3024	1.6%
TITAN	3196	3149	1.5%
BAJAJFINSV	1561	1540	1.4%
ADANIPTS	831	825	0.8%
Top 5 Nifty Losers	03-Oct	29-Sep	Var(%)
ONGC	185	192	-3.8%
EICHERMOT	3351	3447	-2.8%
HINDALCO	480	493	-2.6%
MARUTI	10347	10611	-2.5%
DRREDDY	5462	5587	-2.2%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	65512	-0.5%	-0.8%	-0.2%	12.8%
MIDCAP	32369	0.1%	0.9%	2.0%	28.7%
SMLCAP	37790	0.6%	1.9%	0.1%	31.6%
AUTO	36184	-1.2%	-1.6%	0.2%	24.1%
BANKEKX	50008	-0.3%	-0.7%	0.1%	12.1%
Capital Goods	48209	1.0%	3.5%	5.7%	53.1%
FMCG	18586	-0.5%	-0.5%	0.4%	15.2%
Health Care	28429	-0.2%	2.3%	2.2%	19.9%
IT	31999	-0.2%	-2.3%	-1.3%	14.5%
METAL	23025	-0.8%	1.3%	-0.6%	24.7%
Oil & Gas	18778	-1.3%	-1.1%	-0.4%	0.4%
Power	4621	-0.8%	0.0%	1.8%	-1.7%
Realty	4626	0.4%	1.4%	1.4%	35.6%

NSE USD Futures	03-Oct	29-Sep	Var (%)
Oct Expiry (Rs./\$)	83.22	83.08	0.2%
Nov Expiry (Rs./\$)	83.24	83.10	0.2%
Total Turnover (Rs. Crore)	23399	20502	14%

Sectors	TTM PE
Auto	32.27
Auto Ancillary	42.85
Banking	15.93
Engineering	44.67
Cement	73.11
Diamonds & Jewellery	38.85
Housing Finance	20.5
Infrastructure & Const	29.4
Metals-Aluminium	36.02
Metal - Steel	14.04
Oil Expl.	14.79
Pharma	7.87
Power – Gen. Supp.	41.41
Information Tech.	16.41
Sugar	11.26
Telecom Serv. Prov.	154.7
Tyres	33.67

Maruti Monthly Volume Growth (YoY) (Source: Company)



10 year G-Sec Yield	Current	Previous	Change
US	4.85%	4.80%	5 bps
Japan	0.79%	0.77%	2 bps
India	7.23%	7.22%	2 bps
UK	4.60%	4.56%	3 bps
Libor 3 Mths	5.65%	5.66%	(1) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation – WPI	-0.52%	-1.36%	84 bps
Inflation – CPI	6.83%	7.44%	(61) 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)	-889	-1217	327.6

IIP Growth %	Jul-23	Jul-22	YTD
IIP	5.7	2.2	4.2
Mining	10.7	-3.3	7.3
Manufacturing	4.6	3.1	4.8
Electricity	8.0	2.3	2.9

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	17.00	6774998	17.18	4530045	-1.05%	1	1414.49	1434.00	-1.4%
Wipro	4.82	740056	4.84	1132359	-0.41%	1	401.05	405.45	-1.1%
Dr.Reddy's	66.10	167652	66.49	208821	-0.59%	1	5499.85	5461.70	0.7%
ICICI Bank	22.55	2667274	23.00	3499418	-1.96%	2	938.14	940.30	-0.2%
HDFC Bank	57.52	2255548	57.92	2030454	-0.69%	3	1595.32	1508.05	5.8%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	36.50	36.40	0.1	0.3%
RIL	55.50	55.80	(0.3)	-0.5%
SBI	72.20	72.00	0.2	0.3%

US Economy Data	Current	Previous
Inflation (%) (YoY)	3.70%	3.20%
Unemployment (%)	3.80%	3.50%

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

US GDP	Q2CY23	Q1CY23	Q4CY22
Growth (QoQ Annualized)	2.10%	2.20%	2.60%

China Economy Data	Current	Previous
GDP	6.30%	4.50%
Inflation – CPI (%)	0.10%	-0.30%

Economic Calendar	Date
Indian GDP Data	30 Nov
Indian Inflation Data CPI	12 Oct
Indian Inflation Data WPI	16 Oct
Indian Monetary Policy	6 Oct
India's Industrial Production (IIP)	12 Oct
US Inflation Data	12 Oct
US GDP	To be announced
US Unemployment Data	06 Oct
US Fed Rate	01 Nov
China GDP	18 Oct
China Inflation Data	13 Oct

Event Update

Name	Date	Purpose
Yug Decor Ltd.	05/10/23	Bonus issue
Accelya Solutions India Ltd.	06/10/23	Equity Rs.30.0000 per share(300%)Final Dividend
Focus Lighting & Fixtures Ltd.	06/10/23	Split/Subdivision
Omfurn India Ltd.	06/10/23	Bonus
Surya Roshni Ltd.	06/10/23	Stock Split from Rs.10/- to Rs.5/-
Sigachi Industries Ltd.	09/10/23	Stock Split from Rs.10/- to Re.1/-

Bulk Deal As On 03/10/23

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
531658	ABATEAS	KARAM VIR SINGH	S	50000	20.41
543377	ADISHAKTI	ASHISH NAHATA (HUF) .	B	30000	11.1
543377	ADISHAKTI	UPENDRA GANDALAL SHAH	S	30000	10.83
517546	ALFATRAN	SURBHI INVESTMENTS & TRADING COMPANY PRIVATE	S	47809	59.29
543937	ALPHAIND	DHRUVSUNILGOEL	B	26400	189.15
543594	DPL	DIPNA KEYUR SHAH	S	105000	14.05
543594	DPL	MONISH BAKHLA	B	66000	14.13
543594	DPL	RUBY BAXLA	B	69000	13.87
537707	ETT	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	52984	22.03
540936	GGL	KAMLESH WASAN	S	5425	12.3
540936	GGL	KAMLESH WASAN	B	140486	12.18
515147	HALDYNGL	DALMUS PERFORMANCE FOCUSED FUND	B	428000	116.75
543979	KAHAN	MUKESH KUMAR	B	17600	111.32
531784	KCLINFRA	PRATIK KHANDELWAL	B	940000	1.81
543305	NAVODAYENT	LEMON MANAGEMENT CONSULTANCY PRIVATE LIMITED	B	84000	12.43
543171	ROJL	RUPALBEN JAYESHKUMAR SHAH	S	255091	4.47
512097	SAICOM	NITIN BAKSHI	S	1403950	0.51
543366	SBLI	ASHISH PANCHAL	S	8400	70.21
543366	SBLI	EKLINGJI TRADELINK PRIVATE LIMITED	B	12000	70.58
543366	SBLI	NARMADABEN VAGHELA	B	14400	70.88
543366	SBLI	RINKUBEN VAGHELA	S	6000	70.92
543366	SBLI	RINKUBEN VAGHELA	B	2400	70.75
543366	SBLI	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	S	16800	71.3
543366	SBLI	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	B	6000	69.99
543970	SHOORA	SHETH BROTHER	S	6000	55.32
543970	SHOORA	SHETH BROTHER	B	9000	52.72
543970	SHOORA	VIKASH DAHIYA	S	39000	52.96
538496	TARINI	DEVENDRA VEER GUPTA	B	102000	8.16
531205	TINEAGRO	DIPTI BAJU PAREKH	S	1000	47.64
531205	TINEAGRO	SYKES AND RAY EQUITIES (INDIA) LIMITED	B	1211	47.64
542765	TRANSPACT	ANIL KUMAR GOEL (HUF)	S	2000	223
542765	TRANSPACT	ANIL KUMAR GOEL (HUF)	B	1000	223.1
539291	VASUDHAGAM	SYNEMATIC MEDIA AND CONSULTING PRIVATE LIMITED	B	43188	12.27
531025	VISAGAR	VIVEK AGARWAL	S	3000000	0.73
539761	VKAL	DIPAK MATHURBHAI SALVI	S	20511	120
539761	VKAL	NIKHIL RAJESH SINGH	B	20031	120

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ADROITINFO	Adroit Infotech Limited	DREAM ACHIEVER CONSULTANCY SERVICES PRIVATE LIMITED	SELL	132093	24.02
BHANDA-RE	Bhandari Hosiery Exp Ltd	ORBIT FINANCIAL CAPITAL	SELL	183144	1.97
CCL	CCL Products (I) Ltd	NJ BALANCED ADVANTAGE FUND	BUY	757886	654
GATECHDVR	GACM Technologies Limited	ACHINTYA SECURITIES PRIVATE LIMITED	SELL	300000	10.2
GPTINFRA	GPT Infraprojects Ltd	NINE RIVERS CAPITAL LIMITED	SELL	400000	94.31
GOCLCORP	Gulf Oil Corp. Ltd.	NEW LEAINA INVESTMENTS LIMITED	SELL	495000	480.52
HOLMARC	Holmarc Opto Mechatro L	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	78000	87.3
JALAN	Jalan Transolu. India Ltd	RAVI SHOBANA	SELL	75000	5.06
JIWANRAM	Jiwanram Sheoduttra Ind L	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	126000	22.05
KRSNAA	Krsnaa Diagnostics Ltd	EAST LANE CAPITAL LLP	BUY	150000	675
KRSNAA	Krsnaa Diagnostics Ltd	MEDIMAZE SOLUTIONS PRIVATE LIMITED	SELL	150000	675
MADHUSUDAN	Madhusudan Masala Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	74000	110.41
MVGJL	Manoj Vaibhav Gem N Jew L	COLLATE DEALERS PRIVATE LIMITED	BUY	1144862	214.98
MASTER	Master Components Limited	MENTAX IMPEX PRIVATE LIMITED	BUY	32000	140.5
MASTER	Master Components Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	20000	140.2
MASTER	Master Components Limited	S K GROWTH FUND PVT.LTD.	BUY	26000	140.2
NIDAN	Nidan Labs and Health Ltd	MAHADEV MANUBHAI MAKVANA	SELL	192000	31.67
PROV	Proventus Agrocom Limited	BSAS INFOTECH LIMITED	SELL	28000	891
PROV	Proventus Agrocom Limited	VIRAJ RUSSELL MEHTA	BUY	28000	891
SAAKSHI	Saakshi Medtec N Panels L	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	312000	151.62
SHALPAINTS	Shalimar Paints Ltd	HELLA INFRA MARKET PRIVATE LIMITED	BUY	1000000	164.36
SFL	Sheela Foam Limited	BLUE DAIMOND PROPERTIES PRIVATE LIMITED	BUY	834644	1114
SFL	Sheela Foam Limited	BLUE DAIMOND PROPERTIES PRIVATE LIMITED	BUY	834644	1114
SFL	Sheela Foam Limited	WINRO COMMERCIAL INDIA LIMITED	SELL	834644	1114
SFL	Sheela Foam Limited	WINRO COMMERCIAL INDIA LIMITED	SELL	834644	1114
VERTEXPLUS	Vertexplus Technologies L	ZINNIA GLOBAL FUND PCC - BLUE JADE INVESTMENT FUND	SELL	86400	173

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