

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	33550	33619	(69)	-0.2%
Dow Futures	33799	33791	8	0.0%
Nasdaq	13093	13064	29	0.2%
FTSE	7593	7626	(33)	-0.4%
Nikkei	32044	32372	(328)	-1.0%
Hang Seng	17446	17612	(166)	-0.9%
Gift Nifty	19833	19825	9	0.0%
Straits Singapore	3202	3200	2	0.1%
South Korea	2465	2463	2	0.1%
Taiwan	16354	16310	44	0.3%
Shanghai	3108	3107	1	0.0%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8114	8091	23.0	0.3%
Alumin (\$/MT)	2238	2244	(5.5)	-0.2%
Zinc (\$/MT)	2477	2511	(34.5)	-1.4%
Brent Crude (\$/bbl)	97.4	96.6	0.8	0.8%
Gold (\$/Ounce)	1875	1875	(0.1)	0.0%
Silver (\$/Ounce)	22.5	22.5	(0.1)	-0.3%
Light Crude (\$/bbl)	94.6	93.7	0.9	0.9%
N G (\$/mmbtu)	2.9	2.9	0.0	0.2%
Sugar (\$/MT)	709.3	710.7	(1.4)	-0.2%
Rubber (Rs./kg)	145.5	146.0	(0.5)	-0.3%
Baltic Dry Index	1752	1694	58.0	3.4%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	83.23	83.24	-0.01%
Rs./ Euro	87.90	88.23	-0.37%
Rs./Chinese Yuan	11.39	11.39	-0.03%
Yen / \$ rate	149.38	149.63	-0.17%
\$ US/Euro	1.05	1.05	-0.01%

Dollar Index	Current	Previous	Var(%)
Dollar Index	106.67	106.67	0.01%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	19600	44180
Support 2	19480	43740
Resistance	19800	45020

Securities in Ban For Trade	
DELTACORP	INDIACEM

Market Review

US: The S&P 500 Index and Nasdaq 100 indexes declined as oil prices rose to their highest levels in a year and falling crude oil stockpiles stoked concerns about the impact on consumers.

Asia: Shares in Asia fell as investors expected higher interest rates and rising oil prices after crude extended a one-year high.

India: India's benchmark stock indices closed higher on Wednesday, led by gains in Reliance Industries Ltd. and ITC Ltd. The pharma sector rose, whereas banks and non-banking financial companies were under pressure. **Market is expected to open on a flattish note and likely to witness sideways move during the day.**

Global Economy: Orders for long-lasting U.S. manufactured goods rose in August as an increase in machinery and other products offset a drop in civilian aircraft, and business spending on equipment appeared to regain momentum after faltering early in the third quarter. Also shipments of capital goods rebounding sharply last month, a sign of resilience in both business investment and the overall economy despite the Federal Reserve's aggressive monetary policy tightening.

Argentina's poverty rate rose to 40.1% in the first half of 2023, up from 39.2% in the second half of 2022. Over the first half of 2022, it reported a rate of 36.5%. Argentina, a country of some 46 million people, is rich in natural resources from cattle and corn to natural gas, but plagued by high inflation, years of cyclical debt crises and a historic drought that hit key agricultural areas last season.

Commodities: Gold edged up on Thursday but hovered near a more than six-month low hit in the last session, as the dollar and Treasury yields held at elevated levels, with markets awaiting U.S. economic data for clues on the Federal Reserve's interest rate path.

Oil prices rose in early Asian trade on Thursday after surging to the highest settlement in 2023 in the previous session as a steep drop in U.S. crude stocks added to worries of tight global supplies.

Currency: The dollar clung near a 10-month high against a basket of its peers on Thursday, keeping the yen under pressure near a key intervention zone as investors size up upbeat U.S. economic data and fresh comments from Federal Reserve officials.

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	60105	4962	73934	6151	(1189)	204534	17870	191089	16537	13445	1333
Index Option	18614240	1415162	18605257	1414081	1081	5035968	414900	4330643	354802	705325	60098
Stock Future	611886	48898	607745	48034	864	2386435	190315	2394160	189740	(7725)	575
Stock Option	156100	13370	151664	13066	304	279364	22623	324230	26189	(44866)	(3566)
Total	19442331	1482392	19438600	1481332	1060	7906301	645708	7240122	587268	666179	58440

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
20-Sep-23	15777	18853	(3076)
21-Sep-23	10023	11898	(1875)
22-Sep-23	10990	12156	(1165)
25-Sep-23	9199	10585	(1387)
26-Sep-23	9406	9269	138
Month to date-Sept	204598	218434	-13837
FII (Prov.) (Rs Cr)	Buy	Sell	Net
21-Sep-23	9133	12140	(3007)
22-Sep-23	10840	12167	(1327)
25-Sep-23	8511	10844	(2333)
26-Sep-23	8751	9444	(693)
27-Sep-23	9575	9930	(354)
Month to date- Sept	207909	229551	(21642)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
21-Sep-23	7860	6702	1158
22-Sep-23	7902	7101	801
25-Sep-23	8622	7042	1579
26-Sep-23	7502	6788	715
27-Sep-23	8420	8033	386
Month to date-Sept	160112	145262	14850
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
20-Sep-23	378	1519	(1140)
21-Sep-23	428	676	(248)
22-Sep-23	1394	1027	367
25-Sep-23	521	458	63
26-Sep-23	1005	556	449
Month to date-Sept	12984	11981	1004

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1956	51%	1323	54%
Decline	1704	45%	1051	43%
Unchanged	139	4%	85	3%

Market Turnover	27-Sep	26-Sep	Var (%)
BSE Cash	4293	4712	-9%
NSE Cash	67147	62262	8%
NSE Futures	215678	211569	2%
NSE Options	30170876	34697247	-13%
Total (Rs.Cr)	30457993	34975790	-13%

Volatility Index	27-Sep	26-Sep
Volatility Index	11.59	11.19

Index PE - TTM	27-Sep	Yr. High	Yr. Low
Sensex	24.2	26.0	21.8
Nifty	22.3	24.2	20.0

Corporate News

Vedanta is preparing to de-merge sprawling operations

Vedanta Ltd. is nearing a deal to spin off businesses into several listed entities in a broad restructuring that, if successful, could help tycoon Anil Agarwal manage his metals-to-energy. empire's debt load. The company has informed its lenders of the restructuring and could announce the plans in the coming days, according to the people. Businesses including aluminum, oil and gas, iron ore and steel will be separately listed.(MC)

NTPC subsidiary collaborates with ONGC for renewable energy projects

National Thermal Power Corporation (NTPC) announced that its wholly-owned subsidiary, NTPC Green Energy Limited (NGEL) and Oil and Natural Gas Corporation (ONGC) have signed a Memorandum of Understanding (MoU) on September 27 to explore the development of renewable energy and offshore wind power projects in alignment with the Indian government's energy transition objectives.(MC)

P&G Health announces to discontinue injection production at Goa plant

Procter & Gamble Health on Wednesday said that it will discontinue production of injections at its manufacturing plant in Goa from September 30.While announcing the discontinuation of the production of injections at the plant, the company said it plans to source the injection portfolio of its products from a contract manufacturer.(CNBC)

Economy

GST from October on imported online services for personal use

From 1 October, import of online services for personal use from offshore digital services companies such as software sellers, content streaming platforms and social media firms and search engines hosting advertisements will be subject to 18% Integrated Goods and Services Tax (IGST), as per a finance ministry order implementing a set of tax changes introduced in the budget this year.(Mint)

International

Tesla's rivals scrap for thin slices of US EV sales

Ford Motor's decision to hit the brakes on a planned \$3.5 billion battery plant in Michigan highlights a challenge for Tesla's growing crowd of rivals in the U.S. market: Tesla is pushing most of them into unprofitable, low-volume niches.Global automakers are launching scores of new electric vehicles in the United States, and pouring billions of dollars into new EV and battery plants. (Reuters)

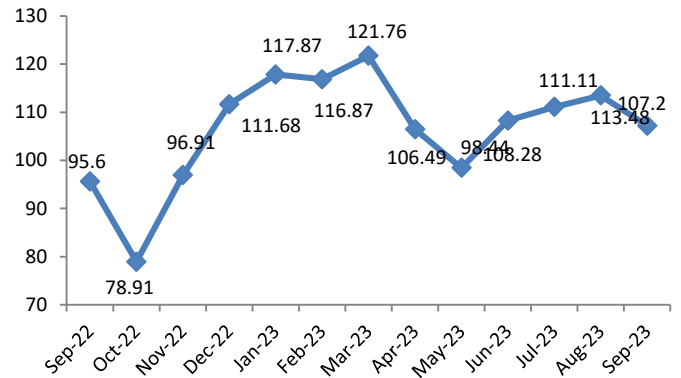
Top 5 Nifty Gainers	27-Sep	26-Sep	Var(%)
LT	2965	2913	1.8%
COALINDIA	292	287	1.7%
ITC	449	442	1.5%
CIPLA	1181	1164	1.4%
SUNPHARMA	1140	1126	1.3%
Top 5 Nifty Losers	27-Sep	26-Sep	Var(%)
TITAN	3215	3263	-1.5%
GRASIM	1931	1958	-1.4%
HEROMOTOCO	3006	3034	-0.9%
SBIN	590	594	-0.8%
BPCL	349	352	-0.8%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	66119	0.3%	-1.0%	1.7%	16.8%
MIDCAP	32310	0.8%	0.0%	4.6%	32.2%
SMLCAP	37477	0.7%	0.2%	3.2%	34.5%
AUTO	36890	0.0%	-1.1%	5.1%	28.1%
BANKEK	50086	-0.1%	-1.9%	0.6%	14.1%
Capital Goods	47226	1.1%	0.7%	5.9%	53.9%
FMCG	18912	0.8%	0.6%	1.9%	18.2%
Health Care	28072	1.1%	-1.0%	0.8%	22.7%
IT	32746	0.5%	-0.9%	5.1%	19.4%
METAL	22833	0.1%	-0.6%	7.4%	29.0%
Oil & Gas	18938	-0.4%	-1.1%	1.0%	2.1%
Power	4635	0.2%	-1.0%	6.6%	-1.8%
Realty	4610	0.7%	0.7%	7.0%	39.7%

NSE USD Futures	27-Sep	26-Sep	Var (%)
Sep Expiry (Rs./\$)	83.25	83.23	0.0%
Oct Expiry (Rs./\$)	83.26	83.29	0.0%
Total Turnover (Rs. Crore)	27429	57866	-53%

Sectors	TTM PE
Auto	32.29
Auto Ancillary	42.81
Banking	15.88
Engineering	37.55
Cement	44.18
Diamonds & Jewellery	75.05
Housing Finance	20.41
Infrastructure & Const	35.31
Metals-Aluminium	14.32
Metal - Steel	13.85
Oil Expl.	7.6
Pharma	40.37
Power – Gen. Supp.	16.24
Information Tech.	30.13
Sugar	11.09
Telecom Serv. Prov.	151.45
Tyres	33.79

Iron Ore Spot (Rs/Tonne) (Source: BBG)



10 year G-Sec Yield	Current	Previous	Change
US	4.60%	4.61%	(0) bps
Japan	0.75%	0.74%	1 bps
India	7.17%	7.14%	3 bps
UK	4.36%	4.33%	3 bps
Libor 3 Mths	5.65%	5.65%	(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)	-1273	-1393	120.1

IIP Growth %	Jul-23	Jul-22	YTD
IIP	5.7	2.2	4.2
Mining	7.6	7.8	6.3
Manufacturing	3.1	12.9	4.7
Electricity	4.2	16.4	1.3

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	17.44	10292236	17.27	5946590	0.98%	1	1451.53	1467.00	-1.1%
Wipro	4.95	2308149	4.88	634052	1.43%	1	411.99	415.65	-0.9%
Dr.Reddy's	65.76	167710	65.94	189601	-0.27%	1	5473.20	5496.45	-0.4%
ICICI Bank	22.81	4821969	22.74	5484708	0.31%	2	949.24	943.10	0.7%
HDFC Bank	58.44	2552994	58.21	2722122	0.40%	3	1621.32	1526.85	6.2%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	35.30	34.70	0.6	1.7%
RIL	56.80	55.90	0.9	1.6%
SBI	71.40	71.20	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%	2.00%	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	28 Sep
US Unemployment Data	06 Oct
US Fed Rate	01 Nov
China GDP	18 Oct
China Inflation Data	13 Oct

Event Update

Name	Date	Purpose
Bajaj Holdings & Investment Ltd.	29-09-2023	Rs.110.00 per share(1100%)Interim Dividend
Hindprakash Industries Ltd.	29-09-2023	Rs.0.50 per share(5%)Final Dividend
Hindustan Aeronautics Ltd.	29-09-2023	Stock Split from Rs.10/- to Rs.5/-
Maharashtra Scooters Ltd.	29-09-2023	Rs.110.00 per share(1100%)Interim Dividend
Sinclairs Hotels Ltd.	29-09-2023	Buy Back of Shares
Viaz Tyres Ltd.	29-09-2023	Annual General Meeting.

Bulk Deal As On 27/09/23

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
540615	7NR	UMANG VIJAYKUMAR TRIVEDI	S	2000000	0.53
543499	ACHYUT	KHODEEAR ENTERPRISE LLP	B	135000	56.46
543499	ACHYUT	SERA INVESTMENTS & FINANCE INDIA LIMITED	S	130500	56.48
540681	CHOTHANI	PRARABDHA VIBHAV MISHRA	B	60000	27.11
543594	DPL	DIPNA KEYUR SHAH	S	105000	14.57
542724	EARUM	AMRAPALI CAPITAL AND FINANCE SERVICES LIMITED	S	3975619	0.97
537707	ETT	HANSABEN BHARATKUMAR PATEL	B	148557	24.62
537707	ETT	SOMA DUTTA	S	52000	24.64
512443	GANONPRO	DINESH NUWAL HUF	S	87000	15.53
512443	GANONPRO	MANISH MOHAN SINGH GANDHI (HUF)	B	65000	15.54
541703	GFIL	AMIT BAJAJ	B	32000	20.55
541703	GFIL	GAURAV KUMAR	S	32000	20.55
541983	INNOVATIVE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	64000	17.69
541983	INNOVATIVE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	64000	17.69
541983	INNOVATIVE	STOCK VERTEX VENTURES	S	60000	17.69
541983	INNOVATIVE	SUNITA RADHESHYAMJI PANPALIA	S	95000	19.55
531550	JHACC	KAMLABEN VITTHALBHAI PATEL	S	84191	162.45
543305	NAVODAYENT	CREATEROI FINANCIAL CONSULTANCY PRIVATE LIMITED.	B	108000	11.8
543305	NAVODAYENT	ESPEON CONSULTING PRIVATE LIMITED.	B	276000	11.8
519494	NKIND	ASHOK BHOWALKA HUF	B	50012	38.2
519494	NKIND	ROHIT CHAUDHARY	S	50000	38.25
539116	OPCHAINS	RAJA RAM SOFTWARE SOLUTIONS LLP	S	300000	20.67
539116	OPCHAINS	SATISH KUMAR GOYAL HUF	B	300000	20.67
530025	SAMYAKINT	BALACHANDRA RAJESH NAIR	S	53833	16.33
543366	SBLI	RINKUBEN VAGHELA	S	2400	69.6
543366	SBLI	RINKUBEN VAGHELA	B	6000	71
543366	SBLI	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	S	2400	71.5
543366	SBLI	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	B	4800	69.05
540914	SRUSTEELS	ANANT OVERSEAS PVT. LTD.	S	80000	11.04
543799	SVJ	MADHU SANJAYKUMAR BUCHA	S	60000	69.46
543799	SVJ	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	54000	69.46
537392	TAAZAIT	NAGARJUNA REDDY KOVVURI	S	39806	12.47
543991	TECHGREEN	BHATIA SURESH	B	38400	87
543991	TECHGREEN	BHATIA SURESH HUF	B	56000	87.18
543991	TECHGREEN	INDIA MAX INVESTMENT FUND LIMITED	S	46400	86.34
543991	TECHGREEN	SP ELECTROSOLUTIONS PRIVATE LIMITED	B	105600	90.31
536264	TIGERLOGS	SAWARNBHUMI VANIJYA PRIVATE LIMITED	B	200249	421
536264	TIGERLOGS	TIGER SOFTECH INDIA PRIVATE LIMITED	S	200000	421
542765	TRANSPACT	ANIL KUMAR GOEL	S	3000	197.93
542765	TRANSPACT	ANIL KUMAR GOEL	B	2000	182.83
532159	TRESCON	ROHIT VILAS KHARCHE	S	650000	14.11
539402	VAL	ABHIJEET PRAMOD SONAWANE	S	150300	17.44
539402	VAL	SADHANA SINGH	B	68693	17.45
539402	VAL	TULSANI SUNIL AMRITLAL	B	67800	17.42
523261	VENKYS	BALAJI RAO BANDA	S	61175	1969.75
523261	VENKYS	VENKATESHWARA HATCHERIES PRIVATE LIMITED	B	61175	1969.75
531025	VISAGAR	SAUMIL ARVINDBHAI BHAVNAGARI	S	12598165	0.74
514378	YARNSYN	VAX ENTERPRISE PRIVATE LIMITED	S	33026	41.83
514378	YARNSYN	VAX ENTERPRISE PRIVATE LIMITED	B	2147	41.51

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
CLSL	Crop Life Science Limited	ASSAM EDIBLE OILS LIMITED	BUY	90000	42.35
HOLMARC	Holmarc Opto Mechatro L	SHANTI CAPINVEST PRIVATE LIMITED	BUY	51000	75.45
INNOVATIVE	Innovative Tyres & Tubes	SANIL RADHESHYAM KALRA	BUY	99000	7.15
KODYTECH	Kody Technolab Limited	360 ONE PRIME LIMITED	SELL	33600	170
KODYTECH	Kody Technolab Limited	AARVI TRADEX & INVESTMENT PRIVATE LIMITED	BUY	97600	169.83
KODYTECH	Kody Technolab Limited	ABHISHEK PREMNARAYAN PARWAL HUF	BUY	40000	170
KODYTECH	Kody Technolab Limited	BEST HORTICULTURE AND CONSULTANCY PRIVATE LIMITED	SELL	35200	170
KODYTECH	Kody Technolab Limited	LRSD SECURITIES PRIVATE LIMITED	SELL	35200	170
KODYTECH	Kody Technolab Limited	PROMISING HORTICULTURE AND CONSULTANCY PRIVATE LIMITED	SELL	35200	170
KODYTECH	Kody Technolab Limited	RAJASTHAN GLOBAL SECURITIES PVT LTD	SELL	35200	170
KODYTECH	Kody Technolab Limited	SOCIAL CERTIFICATION SERVICES PRIVATE LIMITED	BUY	35200	174.87
KODYTECH	Kody Technolab Limited	STCI PRIMARY DELAER LTD	SELL	34400	170
KODYTECH	Kody Technolab Limited	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED .	BUY	70400	171.82
MSPL	MSP Steel & Power Ltd.	STATE BANK OF INDIA	SELL	5700000	15.55
NKIND	Nk Industries Ltd	DR ASHOK BHOWALKA	SELL	50012	39.2
KALAMANDIR	Sai Silks (Kalamandir) L	ASK GOLDEN DECADE FUND	BUY	1538956	233.25
SIGNATURE	Signatureglobal India Ltd	ASTORNE CAPITAL VCC ARVEN	BUY	1229331	445.48
SIGNATURE	Signatureglobal India Ltd	MORGAN STANLEY ASIA (SINGAPORE) PTE.	SELL	744793	447.9
SIGNATURE	Signatureglobal India Ltd	MORGAN STANLEY INVESTMENTS MAURITIUS LIMITED	SELL	767167	444
SIGNATURE	Signatureglobal India Ltd	MORGAN STANLEY MAURITIUS COMPANY LIMITED	SELL	767167	444
SIGNATURE	Signatureglobal India Ltd	SAMYAKTVA CONSTRUCTION LLP	BUY	1700000	444
UJJIVAN	Ujjivan Fin. Servc. Ltd.	BNP PARIBAS ARBITRAGE	SELL	615219	527.58
WESTLIFE	WESTLIFE FOODWORLD LTD	HORIZON IMPEX PRIVATE LIMITED	BUY	292000	998.8
WESTLIFE	WESTLIFE FOODWORLD LTD	MAKINO HOLDINGS LIMITED	SELL	292000	998.8

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