

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	33670	33631	39	0.1%
Dow Futures	33870	33827	43	0.1%
Nasdaq	13407	13574	(167)	-1.2%
FTSE	7600	7645	(45)	-0.6%
Nikkei	31787	32316	(529)	-1.6%
Hang Seng	17741	17813	(73)	-0.4%
Gift Nifty	19729	19701	28	0.1%
Straits Singapore	3167	3186	(19)	-0.6%
South Korea	2429	2456	(27)	-1.1%
Taiwan	16650	16783	(133)	-0.8%
Shanghai	3072	3088	(16)	-0.5%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	7949	7991	(42.0)	-0.5%
Alumin (\$/MT)	2200	2200	(0.5)	0.0%
Zinc (\$/MT)	2446	2450	(3.5)	-0.1%
Brent Crude (\$/bbl)	91.0	90.9	0.1	0.1%
Gold (\$/Ounce)	1921	1933	(12.0)	-0.6%
Silver (\$/Ounce)	22.7	22.7	(0.1)	-0.2%
Light Crude (\$/bbl)	87.8	87.7	0.1	0.1%
N G (\$/mmbtu)	3.1	3.2	(0.1)	-2.8%
Sugar (\$/MT)	727.3	711.2	16.1	2.3%
Rubber (Rs./kg)	150.0	150.0	0.0	0.0%
Baltic Dry Index	1945	1935	10.0	0.5%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.26	83.24	0.02%
Rs./ Euro	87.66	88.38	-0.82%
Rs./Chinese Yuan	11.39	11.40	-0.05%
Yen /\$ rate	149.45	149.57	-0.08%
\$ US/Euro	1.05	1.05	0.11%

Dollar Index	Current	Previous	Var(%)
Dollar Index	106.56	106.65	-0.09%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	19660	44230
Support 2	19560	44080
Resistance	19840	44640

Securities in Ban For Trade	
IBULHSGFIN	BALRAMCHIN
MANAPPURAM	PNB
L&TFH	INDIACEM
HINDCOPPER	BHEL
DELTACORP	SUNTV
SAIL	

Market Review

US : US stock market indices ended mostly lower on Friday as deteriorating consumer sentiment data and the Middle East conflict soured investors' risk appetite.

Asia: Asian markets traded lower on Monday as investors await key economic data from China and Japan.

India: India's benchmark stock indices closed lower on Friday, dragged by muted earnings from information technology major Infosys Ltd. **Market is expected to open on a flattish note and likely to witness sideways move during the day.**

Global Economy: U.S. consumer sentiment deteriorated in October, with households expecting higher inflation over the next year, but labor market strength was likely to continue supporting consumer spending.

The Israeli-Hamas war has sharpened focus on rising geopolitical risks for financial markets, as investors wait to see if the conflict draws in other countries with the potential to drive up oil prices further and deal a fresh blow to the world economy.

Commodities: The ongoing Israel-Hamas war has made many worried investors gravitate towards the time-tested safe bet - gold. Gold prices have risen by over 3% in one week.

Crude prices had settled higher after volatile swings last week, amid expectations that the conflict could cause any disruptions in supply from the world's biggest oil producing region. But this was somewhat offset by signs of cooling U.S. demand and higher production.

Currency: The dollar was on the front foot on Monday in cautious trade as tensions in the Middle East escalated, while investors awaited a speech by Federal Reserve Chair Jerome Powell later this week for further clues on the US central bank's rate outlook.

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	35417	2820	45847	3605	(785)	177885	14529	164823	13708	13062	821
Index Option	10441367	812410	10581651	823093	(10683)	3506018	285900	2530674	207131	975344	78769
Stock Future	198315	15830	206760	15835	(5)	2411056	190636	2409839	191084	1217	(448)
Stock Option	376820	30282	378315	30355	(73)	223964	18220	211247	17071	12717	1149
Total	11051919	861342	11212573	872888	(11546)	6318923	509285	5316583	428994	1002340	80291

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
6-Oct-23	6929	6658	271
9-Oct-23	6848	6075	773
10-Oct-23	8083	8988	(904)
11-Oct-23	12645	12823	(178)
12-Oct-23	8623	10369	(1746)
Month to date-Oct	76590	83505	-6915
FII (Prov.) (Rs Cr)	Buy	Sell	Net
9-Oct-23	5052	6050	(998)
10-Oct-23	8067	9073	(1005)
11-Oct-23	12527	12949	(422)
12-Oct-23	8601	10464	(1863)
13-Oct-23	10318	10001	317
Month to date- Oct	81160	93543	(12383)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
9-Oct-23	8217	5555	2661
10-Oct-23	8624	6660	1963
11-Oct-23	8369	7337	1032
12-Oct-23	8706	7174	1532
13-Oct-23	7661	7764	(103)
Month to date-Oct	75788	64267	11521
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
6-Oct-23	1754	743	1011
9-Oct-23	399	886	(487)
10-Oct-23	978	466	513
11-Oct-23	790	771	19
12-Oct-23	2864	1995	869
Month to date-Oct	9859	6713	3146

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1761	46%	1127	45%
Decline	1911	50%	1257	50%
Unchanged	148	4%	114	5%

Market Turnover	13-Oct	12-Oct	Var (%)
BSE Cash	5735	4370	31%
NSE Cash	71147	66769	7%
NSE Futures	98205	77525	27%
NSE Options	13397568	33295287	-60%
Total (Rs.Cr)	13572654	33443951	-59%

Volatility Index	13-Oct	12-Oct
Volatility Index	10.70	10.62

Index PE - TTM	13-Oct	Yr. High	Yr. Low
Sensex	24.3	26.0	21.8
Nifty	22.3	24.2	20.0

Corporate News

Associate ImmunoACT received marketing authorization approval for India's first CAR-T cell therapy

Associate ImmunoACT received marketing authorization approval for India's first CAR-T cell therapy, NexCAR19, for cancer treatment therapy from the Central Drugs Standard Control Organisation. (MC)

Intellect Design Arena partnership with premiere bank

Intellect Design Arena The company partners with Premiere Bank, Philippines, for bank-wide digital transformation in APAC. The partnership includes Intellect's iKredit360 loan origination system with the aim of improving the bank's customer experience. (MC)

Tata motors selling stake in tata technologies

The company will sell a 9% stake in Tata Technologies to TPG Rise Climate for Rs 1,467 crore and another 0.9% stake in TTL to Ratan Tata Endowment Foundation for Rs 146.7 crore. Valuing Tata Technology at Rs.16300cr and currently Tata Motor Hold 74.69%. (MC)

Economy

Basmati exporters stop buying to protest pricing curbs

Basmati exporters and millers in Haryana, Punjab, and western Uttar Pradesh have stopped purchasing rice from wholesale markets due to the government's decision to maintain the minimum export price (MEP) at \$1,200 per tonne. This high MEP makes it difficult for Indian basmati exporters to compete globally. Despite promises to lower the MEP to \$900 per tonne, the government has not done so. Farmers are now facing losses as they are unsure where to sell their newly harvested basmati rice, which is primarily exported.(ET)

International

Microsoft closes Activision deal

Microsoft and Activision Blizzard have finally completed the transaction to merge - Microsoft's largest deal in its 48-year history - after intense regulatory scrutiny and related delays, per the deal that the companies announced back in January 2022 In accordance with that agreement, Activision Blizzard became a wholly owned subsidiary of Microsoft. (Investing)

Top 5 Nifty Gainers	13-Oct	12-Oct	Var(%)
TATAMOTORS	667	637	4.7%
INDUSINDBK	1464	1424	2.8%
HCLTECH	1256	1224	2.6%
TATACONSUM	913	892	2.4%
NESTLEIND	23554	23075	2.1%
Top 5 Nifty Losers	13-Oct	12-Oct	Var(%)
AXISBANK	994	1018	-2.4%
INFY	1431	1466	-2.3%
ADANIENT	2455	2506	-2.1%
SBIN	576	586	-1.7%
WIPRO	411	417	-1.5%

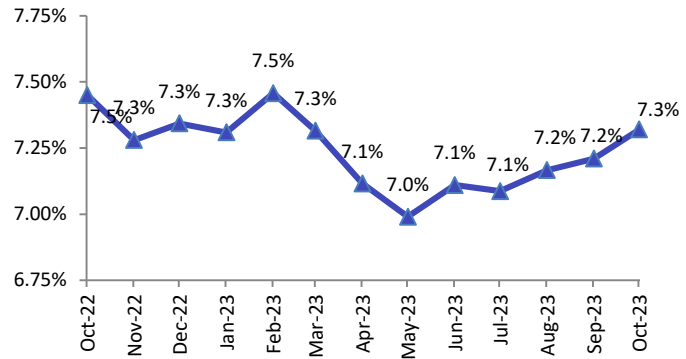
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	66283	-0.2%	0.4%	-2.3%	14.4%
MIDCAP	32306	-0.1%	0.7%	-0.6%	30.7%
SMLCAP	38185	0.0%	0.9%	0.9%	33.9%
AUTO	37271	0.9%	2.9%	0.3%	30.3%
BANKEK	49769	-0.8%	-0.2%	-4.0%	10.7%
Capital Goods	47899	0.0%	-0.6%	1.8%	51.2%
FMCG	19013	0.3%	1.8%	1.1%	20.5%
Health Care	28300	0.3%	0.8%	-1.3%	21.3%
IT	32208	-0.7%	-1.3%	-3.8%	13.7%
METAL	23198	-0.3%	2.4%	-1.2%	24.5%
Oil & Gas	18947	-0.1%	1.3%	-1.6%	4.8%
Power	4538	-0.2%	-0.1%	-1.9%	-1.4%
Realty	4889	0.4%	4.1%	4.2%	46.1%

NSE USD Futures	13-Oct	12-Oct	Var (%)
Oct Expiry (Rs./\$)	83.26	83.25	0.0%
Nov Expiry (Rs./\$)	83.31	83.26	0.1%
Total Turnover (Rs. Crore)	36706	30665	20%

Sectors	TTM PE
Auto	32.92
Auto Ancillary	42.96
Banking	15.75
Engineering	38.68
Cement	45.56
Diamonds & Jewellery	76.72
Housing Finance	20.49
Infrastructure & Const	36.23
Metals-Aluminium	15.11
Metal - Steel	14.09
Oil Expl.	7.71
Pharma	40.99
Power – Gen. Supp.	15.94
Information Tech.	29.33
Sugar	11.36
Telecom Serv. Prov.	157.78
Tyres	34.55

India 10 year bond yield

(Source: BBG)



10 year G-Sec Yield	Current	Previous	Change
US	36.90	37.20	(0.3)
Japan	56.00	55.90	0.1
India	69.80	70.80	(1.0)
UK	36.90	37.20	(0.3)
Libor 3 Mths	56.00	55.90	0.1

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	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)	-192	-315	123.4

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

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	16.90	13208799	16.46	26816408	2.67%	1	1407.16	1431.15	-1.7%
Wipro	4.86	1978160	4.86	1893365	0.00%	1	404.66	411.05	-1.6%
Dr.Reddy's	66.43	248805	66.10	231734	0.50%	1	5531.21	5460.20	1.3%
ICICI Bank	22.74	3629564	22.63	5051173	0.49%	2	946.71	951.30	-0.5%
HDFC Bank	58.20	2118453	58.80	1619228	-1.02%	3	1615.32	1535.75	5.2%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	36.90	37.20	(0.3)	-0.8%
RIL	56.00	55.90	0.1	0.2%
SBI	69.80	70.80	(1.0)	-1.4%

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

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 (%)	0.00%	0.10%

Economic Calendar	Date
Indian GDP Data	30 Nov
Indian Inflation Data CPI	13-Nov
Indian Inflation Data WPI	16 Oct
Indian Monetary Policy	8 Dec
India's Industrial Production (IIP)	10-Nov
US Inflation Data	To be announced
US GDP	26 Oct
US Unemployment Data	3 Nov
US Fed Rate	01 Nov
China GDP	18 Oct
China Inflation Data	To be announced

Event Update

Name	Date	Purpose
Caspian Corporate Services Ltd.	17-Oct-2023	Rs.0.05 per share(5%)Final Dividend
Gensol Engineering Ltd.	17-Oct-2023	Bonus issue
Glenmark Life Sciences Ltd.	17-Oct-2023	Rs.22.50 per share(1125%)Interim Dividend
Kama Holdings Ltd.	17-Oct-2023	Bonus issue
Rudra Global Infra Products Ltd.	18-Oct-2023	Bonus issue
Brand Concepts Ltd.	19-Oct-2023	Rs.0.50 per share(5%)Final Dividend
Semac Consultants Ltd.	19-Oct-2023	Rs.5.00 per share(50%)Final Dividend
Tata Consultancy Services Ltd.	19-Oct-2023	Rs.9.00 per share(900%)Second Interim Dividend
Anand Rathi Wealth Ltd.	20-Oct-2023	Rs.5.00 per share(100%)First Interim Dividend
Angel One Ltd.	20-Oct-2023	Rs.12.70 per share(127%)Second Interim Dividend
HCL Technologies Ltd.	20-Oct-2023	Rs.12.00 per share(600%)Third Interim Dividend
KPI Green Energy Ltd.	20-Oct-2023	Rs.0.25 per share(2.5%)Second Interim Dividend
Madhya Bharat Agro Products Ltd.	20-Oct-2023	Bonus

Bulk Deal As On 13/10/23

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
538351	AFEL	RISHAN SINGH KEER	S	75000	4.73
543453	ALKOSIGN	DHARMESH BHARAT RATHOD	B	34500	137.27
539546	BNL	NIMISHABEN ASHVINBHAI PARMAR	S	43266	57.62
539546	BNL	NIMISHABEN ASHVINBHAI PARMAR	B	43266	57.98
540681	CHOTHANI	VIBHAV P.D.MISHRA (HUF)	B	30000	33.95
534691	COMCL	JR SEAMLESS PRIVATE LIMITED	B	121704	21.3
538882	EMERALD	RAINPAY INDIA PRIVATE LIMITED	S	438364	23.15
531259	ESHAMEDIA	RAMAN SESHADRI IYER	S	41203	3.18
541983	INNOVATIVE	JEWEL CHITRANJAN GAMADIA	B	59000	28.1
543262	MRP	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	30000	46.6
543262	MRP	SOMYA AGRO SUPERMART	S	69000	44.14
523862	PIFL	PRITI DEEPAK RATHI	S	23000	9.85
543171	ROJL	YMD FINANCIAL CONSULTANCY PRIVATE LIMITED	B	350000	3.96
543171	ROJL	ZENAB AIYUB YACOOBALI	S	351180	3.96
540259	SHANGAR	GUJARAT TOOLROOM LIMITED	B	88480	6.75
540259	SHANGAR	JIGNESH DOSSHI	S	86887	6.78
544001	SUNITATOOL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	11000	132.95
544001	SUNITATOOL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	142000	132.96
544001	SUNITATOOL	SS CORPORATE SECURITIES LIMITED	S	79000	146.8
544001	SUNITATOOL	SS CORPORATE SECURITIES LIMITED	B	13000	141.42
544001	SUNITATOOL	VINEY EQUITY MARKET LLP	B	80000	146.85
537392	TAAZAIN	ARUNA YOGENDRA BAGREE	S	75971	18.11
537392	TAAZAIN	ARUNA YOGENDRA BAGREE	B	75771	18.09
537392	TAAZAIN	BP EQUITIES PVT. LTD.	S	48001	18.09
537392	TAAZAIN	BP EQUITIES PVT. LTD.	B	53001	18.11
537392	TAAZAIN	MADDULA BALA TRIPURA SUNDARI LAKSHMI BHAVANA	S	374966	18.11
537392	TAAZAIN	MADDULA JWALA VENKATA PANDURANGA PRANEETH	S	196594	18.11
537392	TAAZAIN	MADDULA JWALA VENKATA PANDURANGA PRANEETH	B	10000	18.05
537392	TAAZAIN	MANISHKUMAR INDRAVADAN MEHTA	S	42037	18.11
537392	TAAZAIN	MANISHKUMAR INDRAVADAN MEHTA	B	42037	18.08
537392	TAAZAIN	PONNURU SIVA RATNA MAHA LAKSHMI PRASANNA	S	563067	18.11
537392	TAAZAIN	SARATH KUMAR CHENNUPATI	S	46000	18.11
543991	TECHKGREEN	ALACRITY SECURITIES LIMITED	S	60800	196.23
543991	TECHKGREEN	ALACRITY SECURITIES LIMITED	B	17600	192.03
543991	TECHKGREEN	GUTTIKONDA RAJASEKHAR	B	94400	197.78
538918	VANICOM	MAHESH NATVARLAL JARIWALA	B	111000	13.37
538918	VANICOM	SANJEEV GARG	S	111001	13.37
544002	VIVAA	KESAR TRACOM INDIA LLP	B	26000	40.69
544002	VIVAA	PARASRAMPURIA INFRASTRUCTURE LLP	S	50000	40.42
540252	VSL	VIVID MERCANTILE LIMITED .	S	550482	11.25

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ADROITINFO	Adroit Infotech Limited	FOREST VINCOM PRIVATE LIMITED	SELL	151605	21.51
GICL	Globe Intl Carriers Ltd	BHAMINI KAMAL PAREKH	SELL	153000	66.83
GICL	Globe Intl Carriers Ltd	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	144000	66.85
GSTL	Globesecure Techno Ltd	VEENA RAJESH SHAH	BUY	46000	100.35
GOCLCORP	Gulf Oil Corp. Ltd.	AVIATOR GLOBAL INVESTMENT FUND	SELL	330000	515.45
INTLCONV	Intl Conveyors Limited	WOODSIDE FASHIONS LIMITED	SELL	575000	77.65
LIBERTSHOE	Liberty Shoes Ltd	ZAKI ABBAS NASSER	BUY	115000	294.44
MARCO	Marco Cable & Conductor L	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED .	BUY	99000	57.21
MARSHAL-RE	Marshall Machines Limited	KHUSHBOO PAVAN GEHI	SELL	77487	3.15
MARSHAL-RE	Marshall Machines Limited	LITTLESTAR VANIJYA PRIVATE LIMITED	BUY	64410	3.15
OSIAHYPER	Osia Hyper Retail Ltd	PAULOMI KETAN DOSHI	BUY	1409157	50
PLADAINFO	Plada Infotech Services L	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	90000	57.56
PLADAINFO	Plada Infotech Services L	SETU SECURITIES PVT LTD	BUY	51000	57.98
PLADAINFO	Plada Infotech Services L	STCI PRIMARY DELAER LTD	SELL	45000	59
PPL	Prakash Pipes Limited	ARUNA R JAIN	BUY	141843	308.8
RATNAVEER	Ratnav eer Precision Eng L	LEADING LIGHT FUND VCC THE TRIUMPH FUND	SELL	247253	126.08
RATNAVEER	Ratnav eer Precision Eng L	SAUMIK KETAN DOSHI	BUY	318600	133.1
RKEC	RKEC Projects Limited	EARNEST SHIPPING AND SHIP BUILDERS LIMITED	SELL	147444	77.84
SABAR	Sabar Flex India Limited	ANANT AGGARWAL	BUY	80000	27.78
UNIINFO	Uniinfo Telecom Servi Ltd	KAILASHBEN ASHOKKUMAR PATEL	SELL	53558	30.91
UNIVASTU	Univ astu India Limited	JAINAM BROKING LIMITED	SELL	149000	117
UNIVASTU	Univ astu India Limited	PRINCE KETAN SHAH	BUY	147561	117
URBAN	Urban Enviro Waste Mgmt L	MAHESH GUPTA	SELL	33600	137.86
URBAN	Urban Enviro Waste Mgmt L	PARAG BHARAT MEHTA	BUY	24000	141.48
CLOUD	Varanium Cloud Limited	EVLI EMERGING FRONTIER FUND	BUY	674000	187.08
CLOUD	Varanium Cloud Limited	VISAGAR FINANCIAL SERVICES LIMITED	SELL	1101000	186.38
VISHNUINFR	Vishnusurya Proj N Infr L	VISHAL BIPINKUMAR DOSHI	BUY	156000	88.65
VIVO	Vivo Collab Solutions Ltd	SAMPAT DAKULIA	BUY	11200	105
VIVO	Vivo Collab Solutions Ltd	SANTOSH DEVI DAKULIA	SELL	11200	105

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