

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	33120	33130	(10)	0.0%
Dow Futures	33293	33304	(11)	0.0%
Nasdaq	13220	13236	(16)	-0.1%
FTSE	7452	7412	40	0.5%
Nikkei	30999	31075	(76)	-0.2%
Hang Seng	17564	17214	350	2.0%
Gift Nifty	19608	19605	3	0.0%
Straits Singapore	3171	3155	16	0.5%
South Korea	2412	2404	8	0.3%
Taiwan	16520	16454	66	0.4%
Shanghai	3110	3110	Closed	Closed

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	7921	7899	22.0	0.3%
Alumin (\$/MT)	2240	2232	8.0	0.4%
Zinc (\$/MT)	2482	2477	5.0	0.2%
Brent Crude (\$/bbl)	84.0	84.0	0.0	0.0%
Gold (\$/Ounce)	1824	1820	4.0	0.2%
Silver (\$/Ounce)	21.0	21.0	0.0	0.0%
Light Crude (\$/bbl)	83.0	82.0	1.0	1.2%
N G (\$/mmbtu)	3.0	3.0	0.0	0.0%
Sugar (\$/MT)	697.0	691.0	6.0	0.9%
Rubber (Rs./kg)	146.2	146.5	(0.3)	-0.2%
Baltic Dry Index	1827	1778	49.0	2.8%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	83.26	83.24	0.02%
Rs./ Euro	87.49	87.38	0.13%
Rs./Chinese Yuan	11.41	11.41	0.00%
Yen / \$ rate	148.63	148.51	0.08%
\$ US/Euro	1.05	1.06	-0.94%

Dollar Index	Current	Previous	Var(%)
Dollar Index	106.41	106.33	0.08%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	19500	44280
Support 2	19440	44140
Resistance	19600	44550

Securities in Ban For Trade	
IBULHSGFIN	DELTACORP
MANAPPURAM	PNB

### Market Review

**US:** U.S. stocks rebounded from earlier losses Thursday to finish the day little changed after one Fed official's comments gave markets a lift following so-so jobs data.

**Asia:** Shares in Asia were broadly flat before a monthly U.S. payrolls report that will help define the path forward for Federal Reserve interest rates.

**India:** India's benchmark stock indices snapped two days of losses to end higher on Thursday, led by advances in Larsen & Toubro Ltd. and ICICI Bank Ltd. Media, information technology, and consumer durables rose, while public sector banks fell. **Market is expected to open positive note and likely to witness positive move during the day.**

**Global Economy:** In a significant development this Thursday, the long-end of the bond market is seemingly concluding its final round of rate hikes, resulting in a notable jump in US 10-year yields from 4.00% to 4.72%. This shift underscores the market's focus on short-term rates and the potential implications for the Federal Reserve's monetary policy. Futures markets are also reflecting these expectations, with indications of a reduced probability of an interest rate hike. Specifically, chances of a 22% rate hike in November have diminished, and the likelihood of any increase reaching 37% this year appears less likely.

The U.S. trade deficit narrowed more than expected in August as exports increased solidly, likely positioning trade to support economic growth in the third quarter. The trade deficit contracted 9.9% to \$58.3 billion, the lowest level since September 2020, the Commerce Department said on Thursday. Data for July was revised to show the trade gap rising to \$64.7 billion instead of \$65.0 billion as previously reported

**Commodities:** Gold paused near a seven-month low on Friday after declining for nine straight sessions, as investors held their breath for U.S. nonfarm payrolls data that could determine whether interest rates will be raised again.

Oil prices were on track for their steepest weekly decline since March despite rising in early trade on Friday, on growing worries that higher-for-longer interest rates could stoke a global economic slowdown and curb fuel demand.

**Currency:** The dollar dipped on Friday but traders were largely keeping to the sidelines in both the currency and US Treasury markets as they looked to US nonfarm payrolls data later in the day for potential catalysts.

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	58154	4945	54237	4421	524	186943	15525	187428	15226	(485)	299
Index Option	15071210	1334273	15785995	1403714	(69441)	2389713	197462	2989485	266870	(599772)	(69408)
Stock Future	204613	16118	183771	14617	1501	2405375	188169	2450459	190958	(45084)	(2789)
Stock Option	207510	16886	206137	16739	147	158295	12826	151186	12244	7109	582
<b>Total</b>	<b>15541487</b>	<b>1372222</b>	<b>16230140</b>	<b>1439491</b>	<b>(67269)</b>	<b>5140326</b>	<b>413982</b>	<b>5778558</b>	<b>485298</b>	<b>(638232)</b>	<b>(71316)</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
25-Sep-23	9199	10585	(1387)
26-Sep-23	9406	9269	138
27-Sep-23	9975	12164	(2189)
28-Sep-23	24635	27503	(2868)
3-Oct-23	11641	12477	(836)
<b>Month to date-Sept</b>	<b>11641</b>	<b>12477</b>	<b>-836</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
27-Sep-23	9575	9930	(354)
28-Sep-23	10711	14076	(3364)
29-Sep-23	10058	11744	(1686)
3-Oct-23	9715	11749	(2034)
4-Oct-23	9849	14273	(4424)
<b>Month to date- Oct</b>	<b>19563</b>	<b>26021</b>	<b>(6458)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
27-Sep-23	8420	8033	386
28-Sep-23	15118	12407	2711
29-Sep-23	8789	6037	2751
3-Oct-23	9223	7862	1361
4-Oct-23	10050	8281	1769
<b>Month to date-Oct</b>	<b>19273</b>	<b>16143</b>	<b>3131</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
25-Sep-23	521	458	63
26-Sep-23	1005	556	449
27-Sep-23	945	1180	(235)
28-Sep-23	2161	1301	860
3-Oct-23	1956	558	1398
<b>Month to date-Sept</b>	<b>1956</b>	<b>558</b>	<b>1398</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2226	59%	1497	60%
Decline	1433	38%	879	35%
Unchanged	126	3%	106	4%

Market Turnover	05-Oct	04-Oct	Var (%)
BSE Cash	4381	4957	-12%
NSE Cash	66130	77004	-14%
NSE Futures	85354	106825	-20%
NSE Options	36596519	42369781	-14%
Total (Rs.Cr)	36752384	42558567	-14%

Volatility Index	05-Oct	04-Oct
Volatility Index	10.96	11.66

Index PE - TTM	05-Oct	Yr. High	Yr. Low
Sensex	24.0	26.0	21.8
Nifty	22.1	24.2	20.0

Corporate News

**Lemon Tree launches India's largest hotel in Mumbai**

The company opened a 669-room hotel in Mumbai, India's largest by number of rooms, under the Aurika Hotels & Resorts brand. (MC)

**KPI Green Energy Ltd receives new orders of 12.10 MW**

The company received new orders aggregating to 12.10 MW for executing solar power projects, out of which 3.10 MW capacity was undertaken by KPI Green Energy and 9 MW capacity by unit Sun Drops Energia. (BQ)

**Lupin receives U.S. FDA nod for Tolvaptan tablets**

The drugmaker received tentative approval from the USFDA for Tolvaptan tablets to be manufactured at its Nagpur facility. The Tolvaptan tablets had estimated annual sales of \$287 million in the U.S. (BQ)

Economy

**India's services sector in September sees strongest output in 13 years, PMI data shows**

India's services sector had its strongest output in 13 years in September, according to the S&P Global's services PMI. The reading of 61 indicated growth for the 26th consecutive month. Demand strength domestically, as well as higher international sales to Asia, Europe, and North America, contributed to the positive results. Business sentiment and job creation also remained solid. (ET)

**India invites Brazilian industries to become part of its growing supply chain**

India has invited Brazilian companies to join its supply chain in order to strengthen economic ties between the two countries. Commerce Secretary Sunil Barthwal, during his visit to Brazil, discussed ways to promote trade and invited Brazilian industries to be part of India's growing supply chain. The visit took place against the backdrop of a significant increase in bilateral trade, which has doubled over the past two years, reaching USD 16 billion. (ET)

International

**GM makes new counteroffer to UAW in strike talks**

General Motors had made a counteroffer to the United Auto Workers (UAW) in a bid to end a strike by the union against the U.S. automaker. Separately, UAW President Shawn Fain plans an update on the status of the talks with the Detroit Three automakers on Friday in the three-week-old strike. (Inv)

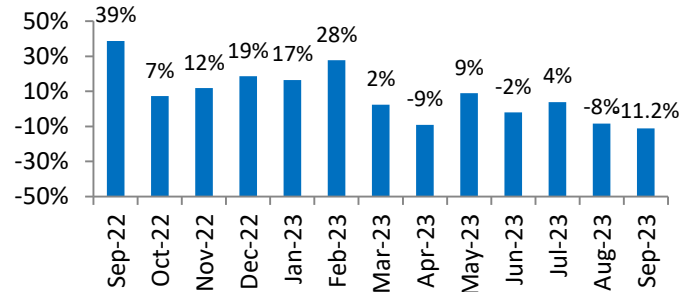
Top 5 Nifty Gainers	05-Oct	04-Oct	Var(%)
LT	3096	3028	2.3%
BAJAJ-AUTO	5011	4919	1.9%
TITAN	3217	3167	1.6%
TCS	3589	3538	1.5%
INFY	1463	1444	1.3%
Top 5 Nifty Losers	05-Oct	04-Oct	Var(%)
POWERGRID	197	199	-1.2%
HINDALCO	471	473	-0.6%
NTPC	234	235	-0.6%
TATACONSUM	860	865	-0.5%
CIPLA	1161	1167	-0.5%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	65632	0.6%	-0.7%	-0.4%	12.7%
MIDCAP	31866	0.0%	-1.4%	-0.8%	25.3%
SMLCAP	37650	0.6%	0.5%	-0.8%	29.4%
AUTO	36079	0.8%	-2.2%	-0.1%	23.2%
BANKEK	49684	0.7%	-0.8%	-0.1%	10.9%
Capital Goods	48194	1.3%	2.0%	5.1%	49.5%
FMCG	18600	0.0%	-1.7%	-1.2%	15.5%
Health Care	27929	-0.3%	-0.5%	-1.5%	17.6%
IT	32415	1.0%	-1.0%	-0.6%	14.3%
METAL	22565	0.0%	-1.2%	-2.4%	17.7%
Oil & Gas	18649	0.2%	-1.5%	-2.7%	-0.9%
Power	4525	-0.6%	-2.4%	-1.0%	-5.3%
Realty	4558	0.4%	-1.1%	-0.2%	30.9%

NSE USD Futures	05-Oct	04-Oct	Var (%)
Oct Expiry (Rs./\$)	83.27	83.26	0.0%
Nov Expiry (Rs./\$)	83.28	83.27	0.0%
Total Turnover (Rs. Crore)	25450	33993	-25%

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

Escorts Monthly Volume Growth (YoY) (Source: Co.)



10 year G-Sec Yield	Current	Previous	Change
US	4.72%	4.72%	0 bps
Japan	0.81%	0.81%	0 bps
India	7.22%	7.24%	(2) bps
UK	4.54%	4.58%	(4) bps
Libor 3 Mths	5.68%	5.68%	0 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)	-258	-183	(75.2)

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



**Bulk Deal As On 05/10/23**

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
542865	ANUROOP	SHIVAAY TRADING COMPANY	S	124116	19.83
534796	CDG	ANISHA FINCAP CONSULTANTS LLP	B	20000	39.93
539405	DITCO	HARSH KUMAR	S	28000	15
539405	DITCO	JIGAR MUKESHBHAI SHAH	S	20481	16.17
539405	DITCO	JIGAR MUKESHBHAI SHAH	B	60481	15.29
539405	DITCO	PRINCEP TRADE & FINANCE PVT LTD	S	40000	15
539405	DITCO	SITA RAM	S	20000	15
539405	DITCO	UTSAVLAL PUKHRAJ HUF	B	50000	15.1
539492	GARBIFIN	LONGVIEW SUPPLIERS PRIVATE LIMITED	S	100000	29
524614	INDXTRA	DIMPALBAHEN HASMUKH JAIN	S	311000	18.13
524614	INDXTRA	KANCHANBEN KIRTILAL SHAH	S	191000	18.19
524614	INDXTRA	MANISHKUMAR INDRAVADAN MEHTA	B	177694	18.18
541983	INNOVATIVE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	70000	24.92
538539	JTAPARIA	KAMALA BAI	B	154813	51.35
538539	JTAPARIA	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	190250	51.35
538539	JTAPARIA	NAMIT SINGH BAKSHI	S	100000	51.35
538539	JTAPARIA	VISHAL BIPINCHANDRA DOSHI	S	104000	51.35
538539	JTAPARIA	VISHAL BIPINCHANDRA DOSHI	B	19250	51.35
540696	KCDGROUP	ANJANI KUMAR GUPTA	B	150000	16.36
530163	KERALAYUR	SHON RANDHAWA	S	75000	159.85
543624	MAAGHADV	SKSE SECURITIES LIMITED CORP CM/TM PROP A/C	B	26000	46.52
514450	MHLXMIRU	JAINAM SHARE CONSULTANTS PVT. LTD.	B	66453	202.05
514450	MHLXMIRU	M/S. PRARTHANA ENTERPRISES	S	66453	202.05
543207	NATURAL	HEMA JAYPRAKASH BHAVSAR	S	77809	9.85
506122	PANKAJPIYUS	RAKESH SAINI	B	3442	123.45
506122	PANKAJPIYUS	ROSHAN LAL	S	2496	123.45
526773	PRESSURS	PRISM GLOBAL VENTURES LIMITED	S	1011170	7.25
511557	PROFINC	SHRENI CONSTRUCTION PRIVATE LIMITED	S	2900000	1.2
511557	PROFINC	TEJALBEN DEEPAKKUMAR SHAH	B	3047007	1.2
537259	SUYOG	NARIMAN INVESTMENT HOLDINGS PRIVATE LIMITED	S	239768	665
537259	SUYOG	NEETA HEMANT ASHAR	B	300000	665.41
526506	SYSTMTXC	SHASHIKANT JAIN	S	65400	368.03
NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
ANNAPURNA	Annapurna Swadisht Ltd	KADAYAM RAMNATHAN BHARAT	BUY	100000	273.75
BHANDA-RE	Bhandari Hosiery Exp Ltd	POORVI ALPESH JHAVERI	SELL	186769	2.04
BHANDA-RE	Bhandari Hosiery Exp Ltd	PRANAV GIRISH BALDAWA	SELL	91690	2.39
GICL-RE	Globe Int'l Car Ltd-RE	DINESH KUMAR SAINI	BUY	30000	0.6
GICL-RE	Globe Int'l Car Ltd-RE	SUBHASH AGRAWAL	SELL	99000	0.64
INDSWFTLTD	Ind-Swift Limited	ASHOKKUMAR CHANDAK	BUY	277560	16.85
INDSWFTLTD	Ind-Swift Limited	SACHIN SAINI	SELL	277560	16.85

INFIBEAM	Infibeam Avenues Limited	ABHISHEK MAYUR DESAI	BUY	6000000	17.4
INFIBEAM	Infibeam Avenues Limited	MAYUR DESAI HUF	SELL	6000000	17.4
INSPIRE	Inspire Films Limited	NAVI FINSERV PRIVATE LIMITED	SELL	96000	69.09
INSPIRE	Inspire Films Limited	NEOMILE GROWTH FUND - SERIES I	SELL	96000	67
INSPIRE	Inspire Films Limited	RASHI FINCORP LTD	BUY	144000	68.04
INSPIRE	Inspire Films Limited	STCI PRIMARY DELAER LTD	SELL	98000	67
KANANIIND	Kanani Industries Ltd	ANILKUMAR BHIKHABHAI VIRANI	SELL	750000	9
MASTER	Master Components Limited	AMOOLYA HARSHAD VASSA	BUY	20000	140.5
MASTER	Master Components Limited	ARYAMAN CAPITAL MARKETS LIMITED	SELL	60000	140.55
MASTER	Master Components Limited	BHAVNA FANCY VASSA	BUY	27000	140.55
MASTER	Master Components Limited	NIRBHAY FANCY VASSA	BUY	22000	140.6
MASTER	Master Components Limited	NOPEA CAPITAL SERVICES PRIVATE LIMITED	SELL	21000	140.58
MASTER	Master Components Limited	SHIV AUM STEELS LIMITED	BUY	20000	140.48
MSPL	MSP Steel & Power Ltd.	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	4000000	19.15
MSPL	MSP Steel & Power Ltd.	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	2500000	19.15
MSPL	MSP Steel & Power Ltd.	PRAGYA MERCANTILE PVT LTD	SELL	2750000	19.15
NEWJAISA	Newjaisa Technologies Ltd	ALACRITY SECURITIES LTD	BUY	234000	69.67
NEWJAISA	Newjaisa Technologies Ltd	AUTHUM INVESTMENT & INFRASTRUCTURE LIMITED	SELL	834000	69.96
NEWJAISA	Newjaisa Technologies Ltd	BAJORIA FINANCIAL SERVICES PRIVATE LIMITED	BUY	162000	68.35
NEWJAISA	Newjaisa Technologies Ltd	BHATIA SURESH HUF	BUY	429000	69
NEWJAISA	Newjaisa Technologies Ltd	NIKUNJ STOCK BROKERS LTD	SELL	423000	72.07
NEWJAISA	Newjaisa Technologies Ltd	SAURABH TRIPATHI	BUY	165000	71.45
NEWJAISA	Newjaisa Technologies Ltd	SHREEKANT PHUMBHRA	BUY	234000	69.83
RADHIKAJWE	Radhika Jew eltech Limited	ARVIND CHHAGANLAL PATEL	SELL	900000	38.52
SECURCRED	SecUR Credentials Limited	JAINAM BROKING LIMITED	BUY	350000	16.95
SECURCRED	SecUR Credentials Limited	SAROJDEVI S KABRA	SELL	350000	16.78
VAISHALI	Vaishali Pharma Limited	MAYADEV I K KABRA	SELL	155995	135.91
VENUSPIPES	Venus Pipes & Tubes Ltd	NEUBERGER BERMAN EQUITY FUNDS A/C NEUBERGER BERMAN EMERGING MARKETS EQ FUND	BUY	144020	1209.92
VERTOZ	Vertoz Advertising Ltd	WILSON HOLDINGS PRIVATE LIMITED	BUY	100000	295

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