

September 27, 2023

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	PREv CLOSe	OpeN	HiGh	LoW	CLOSe	Net CHNg (POINTs)	Net CHNg (%)
BSe SENSEx	65945	65926	66172	65550	66119	↑ 173	0.26%
NSe NiFTy	19665	19637	19731	19554	19716	↑ 52	0.26%
NIFTy MiDCAp 100	40339	40423	40678	40311	40641	↑ 302	0.75%

D-STREET: BULLS BACK In ACTION...!!!

Domestic Eq benchmarks snapped a six-day losing streak and settled higher on strong macroeconomic indicators & positive trends in Asian mrkts. The frontline indices however, opened in a negative territory tracking weak global cues & rebounded in the second half of the session.

Bse Sector: Gainers: Capital Goods, Healthcare, Industrials, FMCG, Telecommunication, Realty, IT, Teck, Energy, Services, Power, Metal, Consumer Discretionary, Commodities, Financial Services, Utilities, Auto **Losers:** Oil & Gas, Consumer Durables, Bankex

ASIAN INDICES				EUROPEAN INDICES*			
CHINa	0.16%	HONGKONG	0.83%	JAPAn	0.18%	FRANCe	0.03%
SINGAPORE	-0.47%	S KOREa	0.09%	TAIWAn	0.21%	Uk	-0.27%
						GERMANY	-0.23%

CBOe ViX (26-09-23)	US DOLLAR INDEX*
18.24	106.336

PROCTEr & GAMBLLe HEALTH LIMITED : CMP Rs.5046 (+2%)

Procter & Gamble Health Limited plans to source injections portfolio of its products from a contract manufacturer, hence the Company shall discontinue production of injections at its manufacturing plant in Goa effective Sept 30, 2023. The injections portfolio, procured from the Company's manufacturing facility at Goa, accounted for revenue of Rs.102.92 cr during the FY 2022-23, constituting 8.37% of the Company's total revenue. Discontinuation of production at Company's plant in Goa, shall not have an impact on continuity of sale of injections by the Company, as the products will be sourced from a contract manufacturer. The Company is outsourcing manufacturing of the injections portfolio, with an intent to achieve cost efficiency and supply optimization.

GLENMARK PHARMACEUTICALS LIMITED : CMP Rs.776 (+2%)

Cosmo Pharmaceuticals N.V. and Glenmark Specialty S.A., a subsidiary of Glenmark Pharmaceuticals Ltd, announced the signing of distribution and license agreements for Winlevi® (clascoterone cream 1%) in Europe and South Africa. Under the terms of the agreements, Glenmark will receive from Cassiopea, a subsidiary of Cosmo, the exclusive right to commercialize Winlevi® in 15 EU countries (Bulgaria, the Czech Republic, Denmark, Finland, France, Hungary, Iceland, the Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Spain and Sweden) as well as in South Africa and the UK.

ALPHALOGIC INDUSTRIES LIMITED : CMP Rs.190 (+1%)

Alphalogic Industries Limited has won order to design, manufacture, supply and installation of Storage Racking System from Scootsy Logistics Private Limited (popularly known as "Swiggy") for their units based in Chennai in Tamil Nadu at three locations, Indore in Madhya Pradesh, Padur in Tamil Nadu & Wagholi and Navi Mumbai, both in Maharashtra. The order is worth Rs.70,23,645.00 Inclusive of GST.

APOLLo HOSPITALS ENTERPRISe LIMITED : CMP Rs.5105 (+1%)

Apollo Multispeciality Hospitals Limited, which is a 100% subsidiary of Apollo Hospitals Enterprise Ltd, India's largest integrated healthcare provider, announced its acquisition of a partially built hospital in Sonarpur, Kolkata with a total capacity of 325 beds as an asset sale. The first phase of the hospital with 225 beds built over 1.75 lakh square feet will be commissioned in the next 12 months and will bring Apollo's hallmark levels of care to more consumers in the eastern region by delivering state-of-the-art healthcare across all broad and high-end specialties including a comprehensive Oncology services with Radiotherapy. The acquisition is being fully funded by Apollo Multi Speciality Hospitals through its own internal accruals.

ASHOKa BUILDCOn LIMITED : CMP Rs.111 (0%)

Ashoka Buildcon Ltd announced the declaration of Sept 08, 2023 as the Commercial Operations Date for its Hybrid Annuity Mode Project of NHAI vide letter issued by Independent Engineer on Sept 26, 2023 for the Project viz. "Four Laning of Tumkur - Shivamogga section from 66+540 (Design km 65+195) (Karadi) to km. 119+790 (Design km. 121+900) (Banwara) of NH-206 on Hybrid Annuity Mode under NHDP Phase-IV in the state of Karnataka (Package-II). The Project is executed by Ashoka Karadi Banwara Road Pvt Ltd (SPV), a Wholly Owned Subsidiary of Ashoka Concessions Ltd, a Subsidiary of the Company.

BEATING tHe STREET (Nifty): Gainers were LT, CIL, ITC, Cipla, LTIMindtree, SunPharma, Maruti, AdaniPorts, RIL, AxisBk, AdaniEntr, ApolloHosp
EXPECTATIOn BELIEd (Nifty): Losers were Titan, Grasim, HeroM, SBI, BPCL, BajAuto, TataConsPrd, HDFCBk, ICICIBk, Nestle, TataStl, BajFin, UPL

MARKET BREADTh

ADVANCES	DECLINES	UNCHANGED	TOTAL
2008 (53%)	1640 (43%)	151 (4%)	3799 (100%)

TURNOVER (in crs)			CUM-DIV NSE 500				CUM- BASIS NSE 500		
	27-09-23	26-09-23	Company	EX DATE	27-09-23	Div	Company	EX DATE	ACTION
Bse	4289	4709	BCG	29-09-23	19	0.10	HAL	29-09-23	FV SPLIT 10-5
Nse	67284	62347	BAJAJHLDNG	29-09-23	7313	110	MARSHALL	29-09-23	RIGHTS 7:10
NSe FO	279956	262706	MAHSCOOTER	29-09-23	7651	110	SURYAROSNI	06-10-23	FV SPLIT 10-5
NSe FPT**	64288	51137	HPIL	29-09-23	125	0.50	FOCUS	06-10-23	FV SPLIT 10-2

VOLUMe SHOCKERs (Bse) (Shares iN LAKHs)

VEDL	44.85	TATASTEEL	14.87
RVNL	7.45	HDFCBANK	6.16

*Values recorded at the time of preparation of product * ** NSE F&O Premium Turnover

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Additional information with respect to any securities referred to herein will be available upon request.

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Identification Suffixes: ## Fundamental Reports, # Universe, N.A (Data not available)

Please Note that our technical calls are totally independent of our fundamental calls.

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