

Market Commentary - Intended for Institutional Clients Only

30-share BSE Sensex climbed 254 points or 0.42% to trade at 60,100, while broader NSE Nifty traded 77 points higher to 17,700 . Singapore Exchange Nifty futures on the Singapore Exchange traded 26.5 points higher at 17,711.50, hinting at a positive start for the domestic market on Tuesday . Bajaj Finance emerged as the top gainer in the index, followed by Larsen & Toubro, Tata Motors, Housing Development Finance Corporation, and Baja Auto .

NEWS

* The Q4 earning season will get started with TCS announcing its result. This will bring IT stocks back in the limelight and action is bound to happen. The reason IT was a sector which did extremely well in covid and it's the one which witnessed correction at the first instance when the rate tightening cycle started in early part of 2022. Stock Reports Plus, powered by Refinitiv, is a comprehensive research report that evaluates five key components of 4,000+ listed stocks - earnings, fundamentals, relative valuation, risk and price momentum to generate standardized scores.

* From the Sensex pack, Kotak Mahindra Bank, Sun Pharma and Bajaj Finserv were the top gainers, rising about 1-4%. Nestle, SBI, NTPC, Bharti Airtel, and Tata Steel also opened with gains. On the flip side, TCS, Asian Paints, HDFC, ICICI Bank, HDFC Bank and IndusInd Bank saw some losses.

* Sensex jumps 200 points, Nifty above 17,650; Kotak Mahindra Bank rises 5%, BoB 3%; Sun Pharma, NTPC, Bajaj Finance are some of the gainers in the morning trade. Sensex gains 200 points, Nifty above 17,650; Kotak Mahindra Bank rises 5%

MARKET TURNOVER (USD Billion)

Category	10042023
Stock Future	5.418015700483092
Nifty	2.5473502415458937
BankNifty	1.0540712560386472

INSTITUTIONAL FLOW (USD Million)

Category	1	5
FPI Cash	223.32004830917876	35.15700483091792
FPI Index future value	223.31884057971018	35.15700483091792
FPI stock future value	94.10265700483093	85.31400966183571
DII stock future value	24.43973724926181	90.25199946144765
Dii index future value	-18.096904027121745	-41.404817530464044
OI PCR	0.8542486900983884	0.9512072602521179

OPTION FLOWS (USD Million)

Category	10042023	06042023	1D Change
FPI call Option	124.2224025737988	284.7155186988091	160.4931161250103
FPI put Option	125.60877384017434	271.6356630747228	146.02688923454846
DII call Option	0.09483796008055373	0.04828877734606807	0.04654918273448566
DII put Option	0.0	0.0	0.0

Information

Source	Bloomberg & NSE for all data tables/data, Exchange data, CNBC and other print media channels
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