

June 2, 2023

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	PREv CLOSe	OpeN	HiGh	LoW	CLOSe	NET CHNg (POINTs)	NET CHNg (%)
BSe SENSEx	62429	62602	62720	62380	62547	↑ 119	0.19%
NSe NiFTy	18488	18551	18574	18478	18534	↑ 46	0.25%
NIFTy MiDCAp 100	33812	33927	34007	33892	33967	↑ 154	0.46%

D-STREET ENDS WITH MODERATE GAINS AMID VOLATILITY...!!!

Frontline Indices resumed their upward march after two days of losses on Friday in light of positive global cues as investors' risk appetite improved after the US passed US debt ceiling legislation, averting US default. Moreover, the market sentiment was also underpinned were signals that the US Fed may not hike rates at its next meeting on June 13-14.

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

ASIAN INDICES				EUROPEAN INDICES*			
CHINA	0.79%	HONGKONG	4.02%	JAPAN	1.21%	FRANCE	1.24%
SINGAPORE	0.24%	S KOREA	1.25%	TAIWAN	1.18%	UK	0.96%
				CBOE VIX (01-06-23)		US DOLLAR INDEX*	
				15.41		103.460	

AURUM PROPTECH LIMITED : CMP Rs.126 (+7%)

The Executive Investment Committee meeting of Aurum PropTech Ltd has approved the acquisition of upto 100% Share Capital of NestAway Tech Pvt Ltd for a cash consideration of upto INR 90 cr. Established in 2015, NestAway Technologies Pvt Ltd is a leading PropTech brand that has gained widespread recognition for its innovative business model & disruptive approach to simplifying the rental process for millennial & professional tenants. It leverages technology & data to streamline property search, scheduling visits, rent payments & service requests. This acquisition will add to the ConsumerTech segment of APTL & is in line with the strategy to create an Integrated PropTech Ecosystem. The completion of the transaction is expected to take place on or before 30th Jun 2023, contingent upon the fulfilment of certain conditions.

MPHASIS LIMITED (#) : CMP Rs.2020 (+2%)

Mphasis Consulting Ltd, a wholly owned subsidiary of Mphasis Ltd, has signed a definitive agreement to acquire 100% of the shares in eBECS Limited (a wholly owned subsidiary of DXC UK International Operations Ltd), subject to fulfilment of closing conditions. eBECS Ltd is a subsidiary of DXC UK International Operations Ltd. It is one of the largest Microsoft Dynamics partners in the UK & Ireland region. The acquisition enhances our ability to address client needs & add significant value to our UK business by bringing in marquee client relationships and innovative service delivery and customer engagement models through Microsoft's Business Applications. The acquisition is part of a revised agreement with DXC, and the Company will ascribe a value for the acquisition in future to be further disclosed in the financials.

ADANI PORTS AND SPECIAL ECONOMIC ZONE LIMITED : CMP Rs.736 (+1%)

Adani Ports and Special Economic Zone Limited has announced the operational performance for May 2023 as under: May 2023 records lifetime high monthly cargo volumes: 1. In May'23, APSEZ handled over 36 MMT of total cargo at its ports, implying 19% YoY growth. 2. On YTD basis, APSEZ has clocked ~68.5 MMT of overall cargo volumes, which is a good 16% YoY growth. Growth observed across most ports and all three cargo segments - Container +24%, Dry Bulk +12%, and Liquids & Gas +10%. 3. Logistics volumes also show a significant jump with YTD rail volumes of ~93,000 TEUs (+25% YoY) and GPWIS volumes of ~3 MMT (+46%).

TATA ELXSI LIMITED : CMP Rs.7698 (+1%)

Tata Elxsi has partnered with Cultos Global to integrate a Blockchain mechanism from Cultos Global with its TETHER Connected Vehicle Platform, to create an innovative Driver Reward Program. This unique proposition of tracking driver behaviour using rich analytics from the cloud-first TETHER connected vehicle platform, augmented with ADAS and driver monitoring features, enables an entirely new way of positively impacting driver behaviour, incentivised through a high-trust and high-privacy blockchain model. This integrated solution will provide mobility players with a dynamic rewards platform that enables consistent engagement and positive behaviour modification through gamification. The driving scorecard which gets translated to tokens is a single digital identifier for a user and can be used across the ecosystem. It will give access to firstparty data for mobility providers with enhanced privacy for end consumers.

BEATING THE STREET (Nifty): Gainers were ApolloHosp, DivisLab, TataMtrs, BajAuto, AsianPaint, HeroM, SunPhr, Cipla, EchrMtr, HUL, DrReddy **EXPECTATION BELIED (Nifty):** Losers were AdniEntr, Infy, BPCL, HDFCLife, TCS, Wipro, EchrMtr, SBILife, HCLTch, DivisLab, RIL, BajFin, IndsIndBk

MARKET BREADTH

ADVANCES	DECLINES	UNCHANGED	TOTAL
2181 (59%)	1364 (37%)	130 (4%)	3675 (100%)

TURNOVER			CUM-DIV NSE 500				CUM- BASIS NSE 500		
	02-06-23	01-06-23	Company	EX DATE	02-06-23	Div	Company	EX DATE	ACTION
Bse	3576	3875	SKMEGGPROD	05-06-23	211	2.00	HARDWYN	05-06-23	FV SPLIT 10-1
Nse	59212	58667	SHYAMMETAL	05-06-23	295	1.80	HARDWYN	05-06-23	BONUS 1:3
NSe FO	12810462	13232178	NELCO	06-06-23	618	2.00	IONEXCHANG	12-06-23	FV SPLIT 10-1
NSe FPT**	52633	54016	PRIMESECU	06-06-23	118	0.50			

VOLUME SHOCKERS (Bse) (Shares in LAKHS)

TATASTEEL	20.43	RVNL	10.94
TATAMOTORS	9.52	HINDALCO	5.38

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

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

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

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

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