

Market Snapshot

KEY INDICES	01-Oct-26	25-Sep-26	%Ch
S&P CNX NIFTY	22421.95	23140.50	-3.11
SENSEX	71909.70	73895.74	-2.69
NIFTY MIDCAP 100	58732.00	60906.00	-3.57
NIFTY SMLCAP 100	19058.65	19715.25	-3.33

(Source: Capitaline, [Investing.com](https://www.investing.com))

Sectoral Snapshot

KEY INDICES	01-Oct-26	25-Sep-26	%Ch
NIFTY BANK	54450.75	55580.40	-2.03
NIFTY AUTO	25384.95	26967.90	-5.87
NIFTY FMCG	43789.85	45941.30	-4.68
NIFTY IT	28304.70	28160.90	0.51
NIFTY METAL	12460.70	13087.15	-4.79
NIFTY PHARMA	26311.55	27003.00	-2.56
NIFTY REALTY	835.00	869.35	-3.95
BSE CG	74133.26	75958.84	-2.40
BSE CD	57809.46	61053.01	-5.31
BSE Oil & GAS	24621.74	25510.59	-3.48
BSE POWER	7144.98	7336.96	-2.62

(Source: [Investing.com](https://www.investing.com))

FII & DII Activities (Rs Crore)

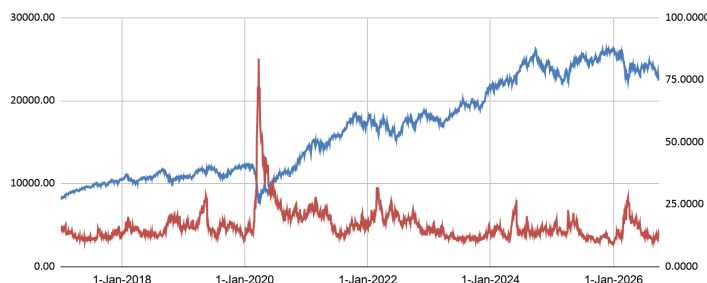
25/09/2026 to 01/10/2026

Activities	FIIs	DIIIs
Buy	78759.65	126049.00
Sell	111243.20	89755.53
Net	-32483.55	36293.47

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



(Source: [NSE](https://www.nseindia.com))

Markets end sharply lower for week amid selling pressure and weak global cues

Indian equity markets closed sharply lower for the week, with the key benchmarks witnessing sustained selling pressure during the trading sessions. The Sensex declined 2.27%, while the Nifty fell 2.78%.

On the domestic front, India's industrial production growth accelerated to 8% year-on-year in August 2026 from 7.4% in July, supported by stronger manufacturing and electricity output, while mining activity contracted. Meanwhile, global markets remained under pressure from elevated US Treasury yields and persistent inflation concerns. The US 10-year Treasury yield climbed to 5.293%, its highest level since June 2007, while the 30-year yield rose to 5.6206%, its highest level since June 2002. US job openings declined in August, while consumer confidence fell to its lowest level since 2014. Overall, elevated bond yields, inflation concerns, higher energy prices and weak global cues kept investor sentiment cautious during the week.

Sensex Gainers - Weekly

SCRIPS	01-Oct-26	25-Sep-26	%Ch
KOTAKBANK	419.80	403.40	4.07
INFY	1035.00	1000.95	3.40

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	01-Oct-26	25-Sep-26	%Ch
TITAN	4535.00	4879.00	-7.05
M&M	2851.05	3031.35	-5.95
MARUTI	11400.00	12071.00	-5.56
POWERGRID	254.65	269.25	-5.42
HINDUNILVR	1841.00	1940.00	-5.10

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	01-Oct-26	25-Sep-26	%Ch
KOTAKBANK	418.35	404.00	3.55
INFY	1035.00	1000.20	3.48
HDFCLIFE	534.20	531.00	0.60
DRREDDY	1206.20	1201.00	0.43
KOTAKBANK	418.35	404.00	3.55

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	01-Oct-26	25-Sep-26	%Ch
BAJAJ-AUTO	10045.00	11281.00	-10.96
TITAN	4515.70	4884.00	-7.54
GRASIM	2962.00	3191.00	-7.18
UPL	516.80	550.05	-6.04
EICHERMOT	6920.00	7360.00	-5.98

(Source: Capitaline)

India's industrial production growth accelerated to 8.0% year-on-year in August 2026, up from an upwardly revised 7.4% in July. Manufacturing output, which has the highest weight in the IIP, grew 9%, accelerating from 8.2% in July. Elsewhere, electricity and gas supply growth accelerated to 12.3% from 8.7% in July, while mining and quarrying output fell 5.6%, following a 0.9% decline in the previous month.

In the week ended on Thursday, 1 October 2026, the S&P BSE Sensex tanked 1,670.84 points or 2.27% to settle at 71,909.70. The Nifty 50 index lost 641.15 points or 2.78% to settle at 22,421.95.

Global Markets:

Spain's annual inflation rate to 4.9% in September from 4.3% in August, according to flash data, marking its highest level since February 2023. The increase was driven largely by higher fuel prices amid the energy shock linked to the Middle East conflict.

US Treasury yields rose, with the 10-year Treasury yield climbing to 5.293%, its highest level since June 2007, while the 30-year Treasury yield rose to 5.6206%, its highest level since June 2002. The 30-year fixed mortgage rate increased to 7.58%, its highest level since November 2023.

Expectations for at least a 25-basis-point Fed rate hike at the October meeting fell to 51.5% from nearly 70% earlier in the session, following comments from New York Fed President John Williams that the central bank had time to assess incoming data before deciding on another rate increase.

US job openings fell by 256,000 to 7.079 million in August, the lowest level in five months. The Conference Board's consumer confidence index declined 6.7 points to 81.9 in September, its lowest level since 2014.

(Source: Capitaline)

Nifty Midcap 100 Gainers - Weekly

SCRIPS	01-Oct-26	25-Sep-26	%Ch
SUNTV	599.90	513.20	16.89
LALPATHLAB	2005.10	1952.30	2.70
COFORGE	1826.00	1784.00	2.35
LTTS	3267.80	3206.10	1.92
APOLLOTYRE	404.75	400.10	1.16

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	01-Oct-26	25-Sep-26	%Ch
POLICYBZR	980.00	1166.00	-15.95
PATANJALI	355.15	403.95	-12.08
IDEA	12.64	14.26	-11.36
COROMANDEL	1763.60	1963.90	-10.20
LICHSGFIN	509.00	566.00	-10.07

(Source: Capitaline)

World Markets

KEY INDICES	02-Oct-26	25-Sep-26	%Ch
DJIA	51176.96	51828.62	-1.26
NASDAQ	27190.86	27068.72	0.45
BOVESPA	192114.55	183476.86	4.71
FTSE 100	10461.95	10695.25	-2.18
CAC 40	7897.19	8077.80	-2.24
DAX	25231.20	25408.64	-0.70
MOEX RUSSIA	2279.75	2273.87	0.26
NIKKEI 225	68309.46	66364.20	2.93
HANG SENG	23972.29	24510.09	-2.19
STRAITS TIMES	5634.82	5711.12	-1.34
SHANGHAI COMPOSITE	CLOSED	CLOSED	-
JAKARTA	6036.89	6241.89	-3.28

(Source: Capitaline, [Investing.com](https://www.investing.com))

Outlook and Technical View

Global developments, including the evolving U.S.-Iran conflict, movements in crude oil prices, rising bond yields, movement of rupee against USD, energy market dynamics, interest-rate outlook and other international macroeconomic cues, will also remain key drivers of market sentiment in the near term. Besides, Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be closely monitored.

From the technical standpoint, Nifty may find support at 22223, 22024, 21830, 21498 while levels of 22617, 22810, 23010, 23202 may act as resistance with pivot point at 22417.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	27-Oct-26	22520.00	23261.00	-3.19%	98.05	766238	416736	83.87%
BANKNIFTY	27-Oct-26	54800.00	55970.00	-2.09%	349.25	156412	94694	65.18%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SAIL	174.50	179.60	27-Oct-26	41.03%
ASHOKLEY	150.48	151.72	27-Oct-26	11.57%
KOTAKBANK	418.35	421.65	27-Oct-26	11.07%
PNB	109.57	110.43	27-Oct-26	11.02%
BANKBARODA	230.82	232.63	27-Oct-26	11.01%
COALINDIA	420.40	423.65	27-Oct-26	10.85%
HEROMOTOCO	5168.00	5207.00	27-Oct-26	10.59%
TORNTPHARM	4767.30	4802.90	27-Oct-26	10.48%
UPL	516.80	520.65	27-Oct-26	10.46%
ADANIPORTS	1737.80	1750.50	27-Oct-26	10.26%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
NMDC	74.64	74.14	27-Oct-26	-9.40%
JUBLFOOD	443.40	440.75	27-Oct-26	-8.39%
SIEMENS	3804.00	3782.50	27-Oct-26	-7.93%
ASIANPAINT	2407.00	2398.80	27-Oct-26	-4.78%
SHREECEM	21900.00	21835.00	27-Oct-26	-4.17%
VEDL	252.05	251.45	27-Oct-26	-3.34%
APOLLOHOSP	8133.50	8116.00	27-Oct-26	-3.02%
NATIONALUM	334.90	334.25	27-Oct-26	-2.72%
BHARATFORG	1875.00	1872.20	27-Oct-26	-2.10%
BRITANNIA	4778.00	4771.60	27-Oct-26	-1.88%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	63404445	66003535	0.96

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

1. INFY	2. COFORGE	3. BAJAJ-AUTO	4. UNOMINDA	5. TIINDIA
6. BHARATFORG	7. EICHERMOT	8. M&M	9. BOSCHLTD	10. MARUTI
11. ASHOKLEY	12. MSUMI	13. HYUNDAI	14. TMPV	15. HEROMOTOCO
16. TVSMOTOR				

(Source: [Moneycontrol](#))

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : helpdesk@shriraminsight.com | www.shriraminsight.com |