

Market Snapshot

KEY INDICES	03-Oct-25	26-Sep-25	05-Sep-25
S&P CNX NIFTY	24894.25	24654.70	0.97
SENSEX	81207.17	80426.46	0.97
NIFTY MIDCAP 100	57503.35	56378.55	2.00
NIFTY SMLCAP 100	17878.15	17560.90	1.81

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

Sectoral Snapshot

KEY INDICES	03-Oct-25	26-Sep-25	%Ch
NIFTY BANK	55589.25	54389.35	2.21
NIFTY AUTO	26753.10	26484.55	1.01
NIFTY FMCG	55170.60	54847.55	0.59
NIFTY IT	33949.75	33702.00	0.74
NIFTY METAL	10277.10	9888.25	3.93
NIFTY PHARMA	21756.35	21507.20	1.16
NIFTY REALTY	876.10	867.15	1.03
BSE CG	69458.21	68345.94	1.63
BSE CD	58648.74	58118.83	0.91
BSE Oil & GAS	27093.84	26433.05	2.50
BSE POWER	6808.56	6697.54	1.66

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

FII & DII Activities (Rs Crore)

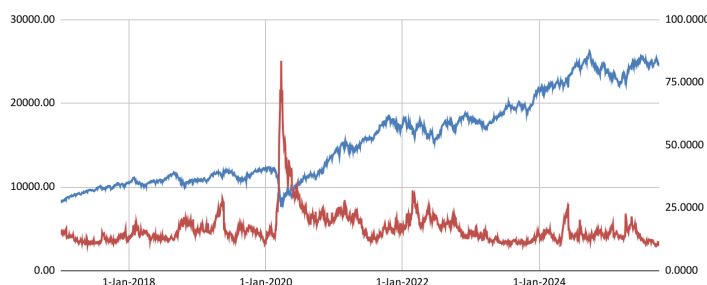
26/09/2025 to 04/10/2025

Activities	FIIs	DIIIs
Buy	79647.55	104361.46
Sell	93924.62	85504.85
Net	-14277.07	18856.61

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Indices snap 6-week losing streak; Nifty ends near 24,900 level

The key equity benchmarks ended the truncated week with substantial gains, snapping a six-session losing streak. The rally was supported by the Reserve Bank of India's Monetary Policy Committee, which kept the repo rate unchanged at 5.5%. The central bank lowered its FY26 inflation forecast and raised its GDP growth projection. Broader market outperformed the frontline indices.

Investors will monitor upcoming IPOs, Brent crude oil prices, key economic data and global market cues. Additionally, the earnings season will gain attention as TCS is set to kick off the cycle, announcing its results on 9th October 2025.

In the week ended on Friday, 3 October 2025, the S&P BSE Sensex advanced 780.71 points or 0.97% to settle at 81,207.17. The Nifty 50 index added 239.55 points or 0.97% to settle at 24,894.25. The BSE Mid-Cap index jumped 2.08% to close at 45,678.11. The BSE Small-Cap surged 2.09% to end at 53,374.98.

Sensex Gainers - Weekly

SCRIPS	03-Oct-25	26-Sep-25	%Ch
TATAMOTORS	716.00	673.00	6.39
KOTAKBANK	2100.90	1994.40	5.34
INDUSINDBK	747.55	712.85	4.87
TITAN	3452.35	3327.35	3.76
TATASTEEL	173.20	167.45	3.43

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	03-Oct-25	26-Sep-25	%Ch
MARUTI	15805.45	16266.70	-2.84
BHARTIARTL	1895.60	1916.70	-1.10
RELIANCE	1363.45	1377.75	-1.04
TECHM	1400.75	1407.50	-0.48
ULTRACEM	12014.90	12070.55	-0.46

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	03-Oct-25	26-Sep-25	%Ch
TATAMOTORS	716.10	672.90	6.42
BPCL	341.55	324.35	5.30
KOTAKBANK	2100.50	1994.80	5.30
HINDALCO	780.35	743.85	4.91
INDUSINDBK	747.40	712.75	4.86

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	03-Oct-25	26-Sep-25	%Ch
MARUTI	15806.00	16286.00	-2.95
EICHERMOT	6941.00	7047.00	-1.50
COALINDIA	383.35	389.15	-1.49
BHARTIARTL	1896.70	1916.60	-1.04
RELIANCE	1363.40	1377.60	-1.03

(Source: Capitaline)

The HSBC India Manufacturing PMI was revised down to 57.7 in September 2025 from a preliminary estimate of 58.5, and compared to August's 17-and-a-half-year high of 59.3.

India's industrial output grew by 4% in August as against the growth of 4.3% in July. Manufacturing activity grew by 3.8% on an annual basis in August, compared to 6% last month. Mining output, another key component of the IIP, rose 6% year-on-year in August versus a fall of 7.2% last month. Electricity production increased 4.1% as against 3.7% in the previous month.

The Reserve Bank of India's Monetary Policy Committee (MPC) kept the policy repo rate unchanged at 5.5% in its review that concluded on 1 October 2025.

The committee maintained a neutral stance, noting that it was prudent to wait for the impact of past policy measures and for greater clarity on global developments before making further moves. The standing deposit facility (SDF) rate stays at 5.25%, while the marginal standing facility (MSF) rate and the bank rate remain at 5.75%.

The central bank raised its real GDP growth forecast for FY26 to 6.8% from 6.5% earlier, projecting growth at 7% in Q2, 6.4% in Q3, and 6.2% in Q4. For Q1 FY27, growth is expected at 6.4%. On inflation, the RBI cut its CPI forecast for FY26 to 2.6% from 3.1%, with projections of 1.8% in Q2 and Q3, 4% in Q4, and 4.5% in Q1 FY27. Inflation is seen staying contained, though tariff-related developments could weigh on the growth outlook in the second half.

Global Market:

In China, the Chinese Manufacturing Purchasing Managers' Index came in at 49.8, data from the National Bureau of Statistics showed. While still in contraction, the latest reading was the strongest since March.

The private surveyor RatingDog's manufacturing purchasing managers' index came in at 51.2 for September, marking its highest level since May.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	03-Oct-25	26-Sep-25	%Ch
LTF	262.33	236.29	11.02
SUNTV	577.80	523.75	10.32
IDEA	8.82	8.02	9.98
HINDZINC	491.50	449.10	9.44
ABCAPITAL	303.95	278.90	8.98

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	03-Oct-25	26-Sep-25	%Ch
DIXON	16591.00	17511.00	-5.25
MAXHEALTH	1069.20	1123.40	-4.82
WHIRLPOOL	1179.40	1232.60	-4.32
IPCALAB	1313.10	1371.20	-4.24
MSUMI	45.74	46.85	-2.37

(Source: Capitaline)

In U.S., the personal consumption expenditures (PCE) price index rose 0.3% in the month, lifting the annual headline inflation rate to 2.7% from 2.6% in July. Core PCE, which excludes food and energy, increased 0.2% on the month and remained unchanged at 2.9% year-on-year.

The US government has entered its first shutdown since 2019 after Congress failed to pass a stopgap spending bill, triggering the furlough of about 750,000 federal employees and disruption of services. The standoff stems from a clash between President Donald Trump and Democrats over healthcare funding, with neither side backing down. Unlike past shutdowns, the administration has indicated readiness for a prolonged impasse and even suggested making some of the temporary job losses permanent, signalling a strategy that could reshape the federal workforce.

(Source: Capitaline)

Outlook and Technical View

The Q2FY26 earnings season will gain attention as TCS is set to kick off the cycle. Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar and crude oil prices will also dictate trend on the bourses in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be monitored.

From the technical standpoint, Nifty may find support at 24793, 24692, 24636, 24502 while levels of 24950, 25006, 25107, 25202 may act as resistance with pivot point at 24849.

(Source: Capitaline)

World Markets

KEY INDICES	03-Oct-25	26-Sep-25	%Ch
DJIA	46758.28	46247.29	1.10
NASDAQ	22780.51	22484.07	1.32
BOVESPA	144200.66	145446.66	-0.86
FTSE 100	9491.25	9284.83	2.22
CAC 40	8081.54	7870.68	2.68
DAX	24378.80	23739.47	2.69
MOEX RUSSIA	2604.55	2725.97	-4.45
NIKKEI 225	45769.50	45354.99	0.91
HANG SENG	27140.92	26128.20	3.88
STRAITS TIMES	4411.95	4265.98	3.42
SHANGHAI COMPOSITE	3882.78	3828.11	1.43
JAKARTA	8118.30	8099.33	0.23

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

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	28-Oct-25	25007.10	24819.70	0.76%	112.85	720618	390726	84.43%
BANKNIFTY	28-Oct-25	55856.00	54805.00	1.92%	266.75	127808	77604	64.69%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
IDEA	8.82	8.89	28-Oct-25	11.59%
LICHSGFIN	578.45	582.55	28-Oct-25	10.35%
MFSL	1604.10	1615.10	28-Oct-25	10.01%
GRASIM	2791.40	2810.50	28-Oct-25	9.99%
PNB	114.37	115.15	28-Oct-25	9.96%
IGL	209.03	210.45	28-Oct-25	9.92%
TATACONSUM	1137.50	1145.20	28-Oct-25	9.88%
DABUR	496.15	499.50	28-Oct-25	9.86%
VEDL	470.95	474.10	28-Oct-25	9.77%
ADANIENT	2589.90	2607.20	28-Oct-25	9.75%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
PAGEIND	42875.00	41900.00	28-Oct-25	-33.20%
WIPRO	240.98	239.03	28-Oct-25	-11.81%
VOLTAS	1360.40	1353.10	28-Oct-25	-7.83%
HCLTECH	1393.50	1386.90	28-Oct-25	-6.91%
ASHOKLEY	139.79	139.19	28-Oct-25	-6.27%
GODREJCP	1149.00	1145.30	28-Oct-25	-4.70%
CHOLAFIN	1570.90	1566.20	28-Oct-25	-4.37%
INFY	1446.60	1442.30	28-Oct-25	-4.34%
TECHM	1400.60	1399.70	28-Oct-25	-0.94%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	45322800	43784325	1.04

(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. NATIONALUM	2. HINDZINC	3. HINDCOPPER	4. LLOYDSME	5. VEDL
6. HINDALCO	7. APLAPOLLO	8. JINDALSTEL	9. TATASTEEL	10. SAIL
11. NMDC	12. JSWSTEEL			

(Source: [Moneycontrol](#))

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