

Market Snapshot

KEY INDICES	10-Oct-25	03-Oct-25	05-Sep-25
S&P CNX NIFTY	25285.35	24894.25	1.57
SENSEX	82500.82	81207.17	1.59
NIFTY MIDCAP 100	58697.40	57503.35	2.08
NIFTY SMLCAP 100	18133.35	17878.15	1.43

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

Sectoral Snapshot

KEY INDICES	10-Oct-25	03-Oct-25	%Ch
NIFTY BANK	56609.75	55589.25	1.84
NIFTY AUTO	26721.20	26753.10	-0.12
NIFTY FMCG	54966.45	55170.60	-0.37
NIFTY IT	35609.05	33949.75	4.89
NIFTY METAL	10261.55	10277.10	-0.15
NIFTY PHARMA	22218.25	21756.35	2.12
NIFTY REALTY	896.65	876.10	2.35
BSE CG	69552.59	69458.21	0.14
BSE CD	59578.37	58648.74	1.59
BSE Oil & GAS	27363.00	27093.84	0.99
BSE POWER	6796.13	6808.56	-0.18

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

FII & DII Activities (Rs Crore)

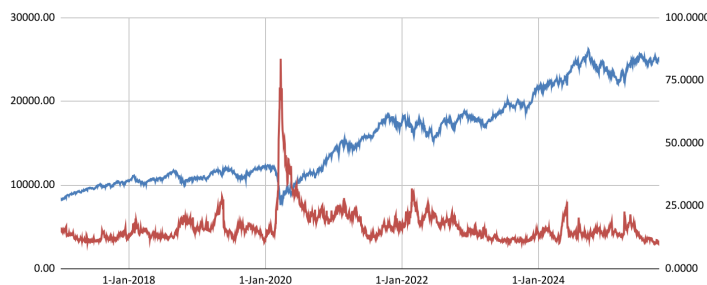
03/10/2025 to 10/10/2025

Activities	FIIs	DIIIs
Buy	79948.47	83153.55
Sell	78013.02	74272.68
Net	1935.45	8880.87

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Markets extend gains for 2nd week on strong earnings sentiment

Domestic equity benchmarks ended the week on a strong note, buoyed by upbeat corporate updates and growing optimism ahead of the Q2 earnings season. Positive global cues and improved investor sentiment also supported the rally. The broader market participated in the uptrend, with mid-cap indices registering gains, while small-caps remained largely flat. Leading companies such as TCS, HDFC Bank, and Titan reported steady performance, although some names like Tata Motors and 5paisa Capital, came under pressure following weaker earnings and business updates.

In the week ended on Friday, 10 October 2025, the S&P BSE Sensex surged 1,293.65 points or 1.59% to settle at 82,500.82. The Nifty 50 index jumped 391.1 points or 1.57% to settle at 25,285.35. The BSE Mid-Cap index added 1.49% to close at 46,362.29. The BSE Small-Cap index was flat end at 53,378.57.

Sensex Gainers - Weekly

SCRIPS	10-Oct-25	03-Oct-25	%Ch
HCLTECH	1494.70	1393.25	7.28
INFY	1514.25	1446.55	4.68
TCS	3028.40	2902.15	4.35
TECHM	1457.25	1400.75	4.03
BAJFINANCE	1023.70	989.65	3.44

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	10-Oct-25	03-Oct-25	%Ch
TATAMOTORS	679.05	716.00	-5.16
ASIANPAINT	2340.30	2358.30	-0.76
NTPC	339.50	341.90	-0.70
HINDUNILVR	2529.10	2544.30	-0.60
ITC	402.80	404.35	-0.38

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	10-Oct-25	03-Oct-25	%Ch
DIVISLAB	6474.50	5866.00	10.37
HCLTECH	1495.50	1393.50	7.32
INFY	1514.90	1446.60	4.72
TCS	3028.30	2901.90	4.36
TECHM	1457.20	1400.60	4.04

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	10-Oct-25	03-Oct-25	%Ch
TATAMOTORS	678.95	716.10	-5.19
BRITANNIA	5871.50	5992.50	-2.02
HDFCLIFE	747.30	759.20	-1.57
HEROMOTOCO	5500.00	5550.50	-0.91
BPCL	338.70	341.55	-0.83

(Source: Capitaline)

The seasonally adjusted HSBC India Services PMI Business Activity Index stood at 60.9 in September 2025 as against 62.9 in August, however, the latest figure showed a loss of growth momentum.

The HSBC India Composite PMI Output Index slipped from 63.2 in August to 61.0, indicating the weakest rate of expansion since June. India's private sector continued to experience robust growth, but there were softer increases in new orders, international sales, business activity and employment during September.

Global Markets:

The World Bank projected China's economy to expand by 4.8%, compared with 4% predicted in April. The new forecast is closer to China's official target of around 5% growth in gross domestic product in 2025.

A decline in China's GDP by 1 percentage point lowers growth in the rest of developing East Asia and Pacific by 0.3 percentage points, according to World Bank estimates. With the China GDP upgrade, the region is expected to expand by 4.8% this year, versus 4% forecast earlier this year, according to the World Bank.

Beijing announced new restrictions on the export of rare earth minerals and equipment that have been a sticking point in trade talks with the United States.

At the start of the week, France's Prime Minister Sebastian Lecornu resigned from his position just weeks after being appointed, creating a new political crisis in the country.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	10-Oct-25	03-Oct-25	%Ch
TATACOMM	1870.20	1613.80	15.89
YESBANK	24.00	21.85	9.84
FEDERALBNK	208.30	192.37	8.28
MAXHEALTH	1156.40	1069.20	8.16
FORTIS	1060.30	980.40	8.15

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	10-Oct-25	03-Oct-25	%Ch
JINDALSTEL	1015.20	1076.50	-5.69
ABFRL	83.19	87.99	-5.46
JUBLFOOD	602.30	628.45	-4.16
COROMANDEL	2220.50	2301.50	-3.52
BATAINDIA	1169.00	1211.40	-3.50

(Source: Capitaline)

World Markets

KEY INDICES	10-Oct-25	03-Oct-25	%Ch
DJIA	45479.60	46758.28	-2.73
NASDAQ	22204.43	22780.51	-2.53
BOVESPA	140680.34	144200.66	-2.44
FTSE 100	9427.47	9491.25	-0.67
CAC 40	7918.00	8081.54	-2.02
DAX	24241.46	24378.80	-0.56
MOEX RUSSIA	2588.56	2604.55	-0.61
NIKKEI 225	48088.80	45769.50	5.07
HANG SENG	26290.32	27140.92	-3.13
STRAITS TIMES	4427.06	4411.95	0.34
SHANGHAI COMPOSITE	3897.03	3882.78	0.37
JAKARTA	8257.86	8118.30	1.72

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

European Union announced plans on Tuesday to reduce tariff-free quotas on imported steel, and to hike tariffs from 25% to 50% on any excess imports.

(Source: Capitaline)

Outlook and Technical View

The Q2FY26 earnings to remain in focus. 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 25185, 25084, 25011, 24852 while levels of 25359, 25432, 25533, 25652 may act as resistance with pivot point at 25258.

(Source: Capitaline)

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	25415.00	25007.10	1.63%	129.65	691563	720618	-4.03%
BANKNIFTY	28-Oct-25	56897.20	55856.00	1.86%	287.45	115976	127808	-9.26%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
CIPLA	1561.80	1572.20	28-Oct-25	13.50%
MANAPPURAM	284.75	286.40	28-Oct-25	11.75%
MUTHOOTFIN	3156.90	3175.00	28-Oct-25	11.63%
ICICIPRULI	597.70	601.10	28-Oct-25	11.53%
BAJAJFINSV	2004.30	2015.70	28-Oct-25	11.53%
JUBLFOOD	602.30	605.70	28-Oct-25	11.45%
INDUSINDBK	763.35	767.65	28-Oct-25	11.42%
CUMMINSIND	3966.00	3988.30	28-Oct-25	11.40%
ADANIPORTS	1409.40	1417.30	28-Oct-25	11.37%
SBILIFE	1810.40	1820.40	28-Oct-25	11.20%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
HCLTECH	1495.50	1487.80	28-Oct-25	-10.44%
PAGEIND	41640.00	41440.00	28-Oct-25	-9.74%
INFY	1514.90	1508.20	28-Oct-25	-8.97%
BHARATFORG	1220.00	1214.80	28-Oct-25	-8.64%
TECHM	1457.20	1452.60	28-Oct-25	-6.40%
CHOLAFIN	1614.20	1611.60	28-Oct-25	-3.27%
TCS	3028.30	3026.50	28-Oct-25	-1.21%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	47666925	44695725	1.07

(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. HCLTECH	2. LTIM	3. COFORGE	4. INFY	5. TCS
6. TECHM	7. WIPRO	8. OFSS	9. BRITANNIA	10. UNITDSPR
11. GODREJCP	12. EMAMILTD			

(Source: [Moneycontrol](#))

DISCLAIMER

This document has been prepared by Shriram Insight Share Brokers Ltd. and is meant for sole use by the recipient and not for circulation. This document is not to be reported or copied or made available to others. The information contained herein is from sources believed reliable. It should not be considered as an offer to sell or a solicitation to buy any security or as an official confirmation of any transaction. We do not represent that it is accurate or complete and it should not be relied upon as such. This document is prepared for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The investments discussed or recommended in this report may not be suitable for all investors. Shriram Insight Share Brokers Ltd. Stock Recommendation Service is a general recommendation service and is not to be construed as an individual investor-specific Portfolio Management and Advisory Service.

The user assumes the entire risk of any use made of this information. Each recipient of this document should arrive at an independent evaluation of an investment in the securities of companies referred to in this document and should consult their own advisors to determine the merits and risks of such an investment.

Shriram Insight Share Brokers Ltd. shall not be responsible for any loss or liability incurred to the user as a consequence of his or any other person on his behalf taking any investment decisions based on the information, recommendations, research reports, analysis, quotes, etc. provided on the web site.

Shriram Insight Share Brokers Ltd shall not be liable for errors, omissions or typographical errors, disruption delay, interruption, failure, deletion or defect of/in the Service provided by it.

All Users of the Service in countries other than India understand that by using the Service, they may be violating the local laws in such countries. If the User chooses to access the Service from outside India, he shall be responsible for compliance with foreign and local laws.

EQUITIES | DERIVATIVES | COMMODITIES | DP SERVICES | MUTUAL FUNDS | RESEARCH

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 |