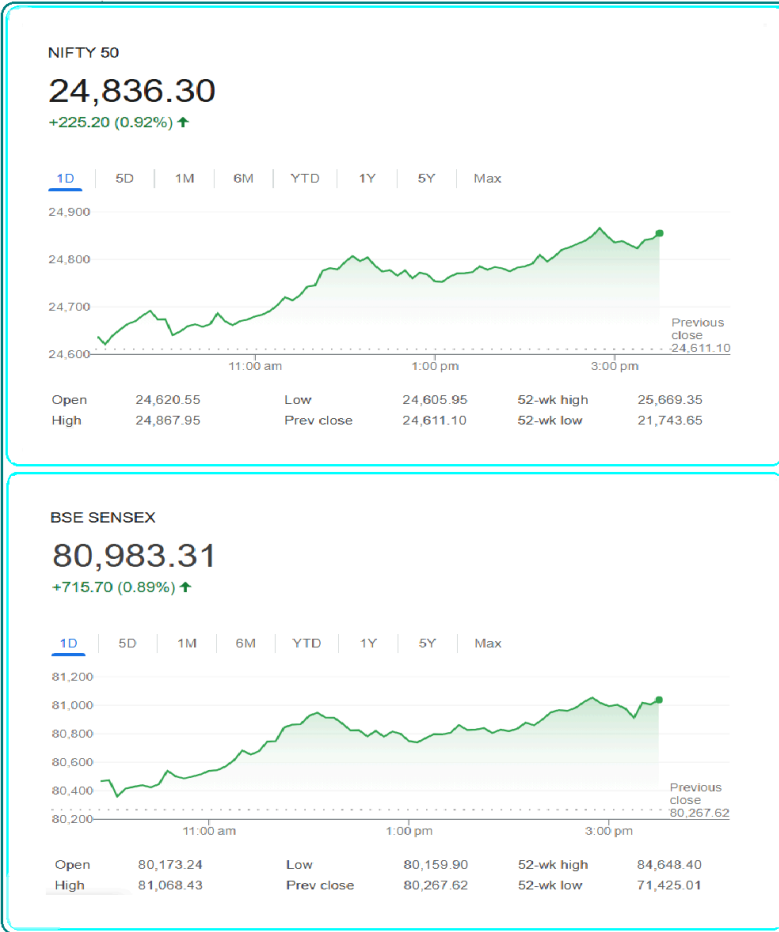


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24836.30	24611.10	0.92%
S&P BSE SENSEX	80983.31	80267.62	0.89%
NIFTY MID100	57029.70	56529.30	0.89%
NIFTY SML100	17755.85	17562.75	1.10%

(Source: [NSE](#), [BSE](#))

Market Wrap Up

- The domestic equity indices ended with significant gains today, snapping an eight-day losing streak, after the RBI's Monetary Policy Committee (MPC) kept the repo rate unchanged at 5.5%. The Nifty settled above the 24,800 level.
- The S&P BSE Sensex jumped 715.69 points or 0.89% to 80,983.31. The Nifty 50 index gained 225.20 points or 0.92% to 24,836.30. In the past eight trading sessions, the Sensex plummeted 3.31% and the Nifty tumbled 3.20%.
- The S&P BSE Mid-Cap index gained 0.91% and the S&P BSE Small-Cap index rose 1.16%.
- Among the sectoral indices, the Nifty Media index (up 3.97%), the Nifty Private Bank index (up 1.97%) and the Nifty Financial Services index (up 1.38%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty PSU Bank index (down 0.37%), the Nifty Oil & Gas index (up 0.21%) and the Nifty Metal index (up 0.55%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **3899** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **RELIANCE, LT, ICICIBANK**.
- Short** position build up for the **November** series has been witnessed in **BHARTIARTL, SBIN, INFY, BAJFINANCE**.
- Unwinding** position for the **November** series has been witnessed in **HDFCBANK, MARUTI**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55347.95	54635.85	1.30%
NIFTY AUTO	26768.65	26542.35	0.85%
NIFTY FMCG	55105.35	54710.70	0.72%
NIFTY IT	33905.20	33655.10	0.74%
NIFTY METAL	10092.95	10038.15	0.55%
NIFTY PHARMA	21733.50	21454.25	1.30%
NIFTY REALTY	877.15	867.60	1.10%
BSE CG	68758.50	68289.99	0.69%
BSE CD	57981.85	57694.25	0.50%
BSE Oil & GAS	26946.03	26910.13	0.13%
BSE POWER	6764.23	6715.08	0.73%

(Source: [NSE](#), [BSE](#))

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	44550.85	44932.63	-0.85%
HANG SENG	CLOSED	26855.56	-
STRAITS TIMES	4323.12	4300.16	0.53%
SHANGHAI	CLOSED	3882.78	-
KOSPI	3455.83	3424.60	0.91%
JAKARTA	CLOSED	8125.20	-
TAIWAN	25982.91	25820.54	0.63%
KLSE COMPOSITE	1620.87	1611.88	0.56%
ALL ORDINARIES	9136.60	9135.90	0.01%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	99744.74	102544.59
NSE F&O	147336.27	318693.38

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1605.20

(Source: [NSE](#))

Corporate News

- L&T Technology Services** has announced a significant breakthrough in its sustainability business segment with the signing of a \$100 million multi-year agreement.
- Bajaj Auto** said that it reported a 9% year-on-year growth in total sales, including exports, to 5,10,504 units in September. The automobile manufacturer had posted total sales of 4,69,531 vehicles in September 2024. Total domestic sales, including commercial vehicles, stood at 3,25,252 units in September 2025, compared to 3,11,887 units in the year-ago period, reporting a growth of 4%. Exports jumped 18% to 1,85,252 vehicles, from 1,57,644 vehicles in the year-ago period.
- Mahindra & Mahindra** announced that its overall auto sales for September 2025 stood at 1,00,298 vehicles, a growth of 16% including exports. In the Utility Vehicle segment, the automaker sold 56,233 vehicles in the domestic market, a growth of 10% and overall 58,714 vehicles, including exports. The domestic sales for Commercial Vehicles stood at 26,728, a growth of 18%.
- Tata Motors** announced a further investment of Rs 120 crore in Freight Commerce Solutions. This brings its total commitment to Freight Tiger to Rs 270 crore. The company aims to transform logistics using artificial intelligence. Tata Motors also established a new subsidiary in the Netherlands. This entity will manage business interests.
- Escorts Kubota** announced that its agri-machinery business division sales grew by 47.6% to 18,267 units in September 2025 as against 12,380 units sold in September 2024. While domestic sales also rose 48.5% to 17,803 units in September 2025 compared with 11,985 units sold in September 2024. The company's exports jumped 17.5% to 464 units in September 2025 as against 395 units posted in September 2024.
- Hyundai Motor India** said that it has achieved total monthly sales of 70,347 units in September 2025, which is a 10% increase from 64,201 units in September 2024. The company's domestic sales rose by 0.87% to 51,547 units in September 2025 from 51,101 units in September 2024.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TATAMOTORS	718.35	680.20	5.61%
SHRIRAMFIN	648.70	616.10	5.29%
KOTAKBANK	2063.30	1992.70	3.54%
ADANIENT	2591.40	2505.90	3.41%
TRENT	4832.00	4677.50	3.30%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ULTRACEMCO	12084.00	12222.00	-1.13%
BAJFINANCE	987.70	998.90	-1.12%
SBIN	864.10	872.45	-0.96%
TATASTEEL	167.51	168.77	-0.75%
ASIANPAINT	2335.80	2350.00	-0.60%

(Source: [Moneycontrol](#))

- VST Tillers Tractors** reported total sales to 3,480 units in September 2025, up from 2,583 units sold in September 2024. The company's power tiller sales grew by 42.27% to 3,002 units in September 2025, compared to 2,110 units in the same month last year. Tractor sales also rose 1.05% to 478 units in September 2025, up from 473 units sold in September 2024. .
- Nestle India** signed an MoU with the Ministry of Food Processing Industries to expedite investments in greenfield and brownfield projects across Odisha and existing manufacturing sites over the next 2-3 years. This initiative, part of its Rs 5,000 crore expansion plan by 2025, aims to create employment and boost capabilities, including a new factory in Odisha.
- Reliance Brands** partners with Stella McCartney to bring the luxury brand to India. The brand uses animal-free materials. Standalone stores will open in six months. Online sales start soon on Ajio Luxe. This targets India's growing luxury market. The market may reach 90 billion dollars by 2030.
- Adani Green Energy Ltd** has commissioned 408 MW of power projects at Khavda in Gujarat, raising its total operational renewable capacity to 16,486.1 MW.
- RailTel Corporation of India** has awarded a Rs 16.31 crore work order to domestic company RTNS Technology for supply and installation services, in line with the customer's requirements.
- Lupin** said that its subsidiary has entered into a pact with Amsterdam-headquartered VISUfarma BV for 100% acquisition at an enterprise value of 190 million euros.
- Lupin** announced that it has received approval from the United States Food and Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) for Rivaroxaban for Oral Suspension, 1 mg/mL.
- Biocon's** arm Biocon Biologics signed a settlement and license deal with Amgen Inc. The pact clears the way for the U.S. launch of denosumab biosimilars Bosaya and Aukelso from 1 October 2025.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

Global News

- U.S. house prices fell by 0.1% from the previous month in July 2025. Year-on-year, house prices advanced by 2.3% in July, the lowest since April 2012 and easing from 2.7% the month before.
- U.S. Conference Board consumer confidence index dropped by 3.6 points to 94.2 this month.
- U.S. Chicago Business Barometer fell to 40.6 in September of 2025 from 41.5 in the previous month.
- U.K. S&P Global manufacturing PMI dropped to 46.2 in September 2025.
- Eurozone inflation rose to 2.2% in September. Meanwhile, core inflation held steady at 2.3%. On a monthly basis, the consumer prices edged up 0.1% in September.
- Eurozone HCOB manufacturing PMI fell to 49.8 in September of 2025 from the three-year high of 50.7 in the previous month.
- Germany's annual inflation rate rose for the second consecutive month to 2.4% in September 2025, up from 2.2% in August. The CPI also rose 0.2% month-on-month.
- Germany's HCOB manufacturing PMI was revised higher to 49.5 in September 2025 from a preliminary of 48.5, and compared to 49.8 in August.
- France's HCOB manufacturing PMI fell to 48.2 in September 2025 from 50.4 in August, compared with a flash reading of 48.1.
- Japan Jibun Bank manufacturing sector continued to contract in September, with a manufacturing PMI score of 48.5. That's down from 49.7 in August.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

Economic News

- Crude Oil traded at US\$ 61.72/bbl (IST 17:00).
- INR strengthened to Rs. 88.70 from Rs. 88.79 against each US\$ resulting in daily change of 0.10%.
- The RBI's Monetary Policy Committee unanimously kept the repo rate at 5.5% and maintained a neutral stance, adopting a wait-and-watch approach amidst US tariffs and geopolitical developments. This decision follows 100 basis points of cuts earlier this year. Goldman Sachs anticipates a further 25 bps cut in December, citing benign inflation and a dovish Fed outlook.
- India HSBC's Manufacturing PMI fell to 57.7 in September from August's more robust 59.3.
- India's oil imports from Russia slightly decreased in September, yet still accounted for a third of its total shipments, despite US efforts to reduce these flows. New Delhi continues to prioritize price-driven deals, with Russian crude

remaining attractive due to discounts. India balances economic advantage with geopolitical considerations, while also exploring diversified energy sources.

- Reserve Bank of India Governor Sanjay Malhotra announced India's forex reserves reached \$700.2 billion. The repo rate remains at 5.5%. The Monetary Policy Committee revised the GDP growth forecast for FY2025-26 to 6.8%. Quarterly growth projections for FY26 were also provided. The RBI monitors the rupee and intervenes to maintain market order.

(Source: [Economic Times](#), [Business Standard](#))

Forthcoming Events

Board Meetings as on 02/10/2025

Sammaan Capital Limited	Fund Raising
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Board Meetings as on 03/10/2025

Muthoot Microfin Limited	Fund Raising
Zaggle Prepaid Ocean Services Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 03/10/2025

Fineotex Chemical Limited	Interim Dividend - Re 0.80 Per Share
Glenmark Pharmaceuticals Limited	Interim Dividend - Rs 2.50 Per Share
Shilpa Medicare Limited	Bonus 1:1
Sumeet Industries Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 2/- Per Share

(Source: NSE)

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