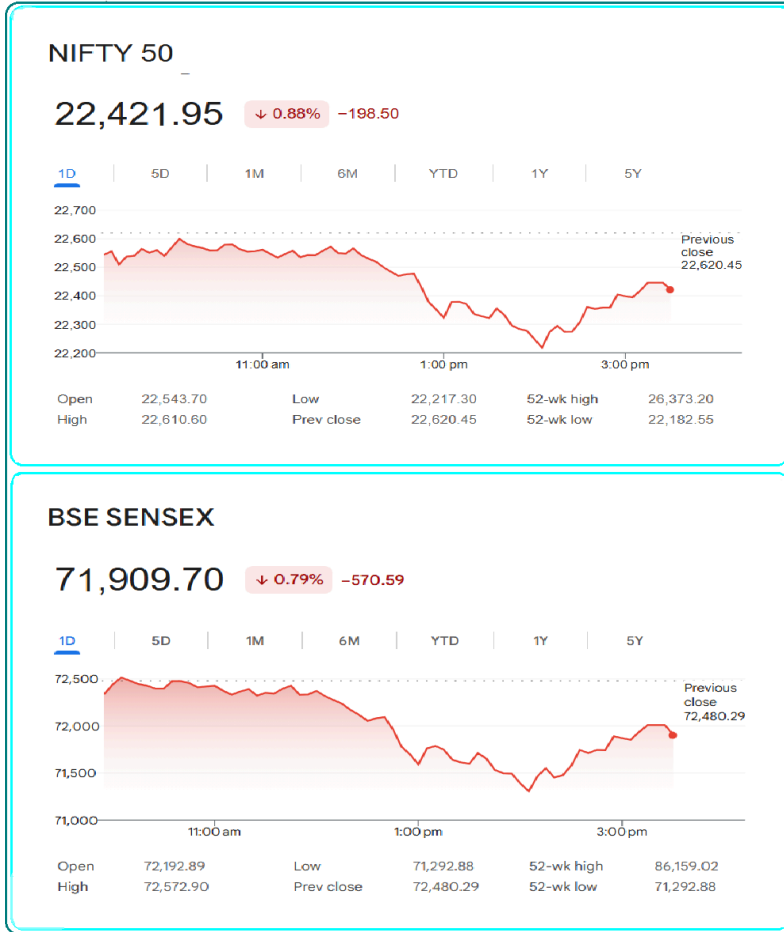


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22421.95	22620.45	-0.88%
S&P BSE SENSEX	71909.70	72480.29	-0.79%
NIFTY MID100	58732.00	59332.05	-1.01%
NIFTY SML100	19058.65	19245.70	-0.97%

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

Market Wrap Up

- The key equity benchmarks ended with significant losses, extending their decline for the fourth consecutive session, as continued selling by foreign institutional investors (FIIs), a weakening rupee and rising Japan's bond yields weighed on investor sentiment. Market sentiment remained subdued amid volatility in crude oil prices and persistent uncertainty surrounding the US-Iran conflict. Investors also tracked monthly auto sales data and updates from the banking sector for further cues. The Nifty settled below the 22,450 level, while broader market stocks also came under pressure. The S&P BSE Sensex declined 570.59 points or 0.79% to 71,909.70. The Nifty 50 index tumbled 198.50 points or 0.88% to 22,421.95. In the four consecutive trading sessions, the Sensex and Nifty declined 2.69% and 3.11%, respectively. The BSE 150 MidCap Index declined 0.99% and the BSE 250 SmallCap Index dropped 1.23%.

- Among the sectoral indices, the Nifty IT index (up 2.17%), the Nifty Private bank (up 0.01%), the Nifty Pharma index (down 0.48%) outperformed the Nifty 50 index. Meanwhile, the Nifty Auto index (down 3.46%), the Nifty Metal index (down 2.35%) and the Nifty Media index (down 2.33%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **October** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **25621** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **INFY, ADANIGREEN, ENRIN**.
- Short** position build up for the **October** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK**.
- Unwinding** position for the **October** series has been witnessed in **HDFCBANK, GODREJCP**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54450.75	54633.05	-0.33%
NIFTY AUTO	25384.95	26293.95	-3.46%
NIFTY FMCG	43789.85	44508.45	-1.61%
NIFTY IT	28304.70	27704.80	2.17%
NIFTY METAL	12460.70	12760.50	-2.35%
NIFTY PHARMA	26311.55	26438.00	-0.48%
NIFTY REALTY	835.00	847.35	-1.46%
BSE CG	74133.26	74129.75	0.00%
BSE CD	57809.46	58603.05	-1.35%
BSE Oil & GAS	24621.74	24894.35	-1.10%
BSE POWER	7144.98	7180.57	-0.50%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	68956.72	66753.72	3.30%
HANG SENG	CLOSED	24613.27	-
STRAITS TIMES	5667.67	5675.88	-0.14%
SHANGHAI	CLOSED	3842.19	-
KOSPI	6971.35	6838.04	1.95%
JAKARTA	6009.50	6071.14	-1.02%
TAIWAN	48353.49	47940.13	0.86%
KLSE COMPOSITE	1630.36	1651.17	-1.26%
ALL ORDINARIES	8794.40	8969.20	-1.95%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	131806.96	126128.84
NSE F&O	144948.23	115621.93

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	9484.22

(Source: [NSE](#))

Corporate News

- Maruti Suzuki India Ltd** reported a 24.4% rise in total sales at 2,36,013 units in September, as compared to 1,89,665 units in the same month last year. Total domestic passenger vehicle sales rose nearly 37% to 1,81,838 units last month from 1,32,820 units a year ago. Total exports increased to 44,219 units in September from 42,204 units in the same month last year. The company reported total production of 2,42,011 units in month of September 2026 compared to 2,01,915 units in September 2025, recording a growth of 20%.
- Tata Motors Passenger Vehicles Ltd** posted its best-ever quarter in Q2 FY27, with total sales rising 40% year-on-year to 201,723 units. The company had sold 144,397 units in the same quarter last year. Domestic passenger vehicle sales stood at 196,674 units in Q2 FY27, against 140,189 units a year earlier, a rise of 40%. International business sales grew 20% to 5,049 units from 4,208 units.
- Bajaj Auto** reported a 5% growth in total sales, including exports, at 5,38,443 units in September this year. The company had reported sales of 5,10,504 vehicles in September 2025. Bajaj Auto, however, saw a 9% fall in its total domestic sales, which included both two-wheelers and commercial vehicles, to 2,94,456 during the previous month, as against 3,25,252 units in the corresponding month last year.
- Mahindra & Mahindra** reported a 15% year-on-year rise in overall auto sales for the month of September at 1,14,874 vehicles, including exports. In the Utility Vehicles segment, Mahindra sold 64,092 vehicles in the domestic market, a growth of 14% and overall, 1,14,874 vehicles, including exports.
- Royal Enfield** reported an 8% year-on-year increase in total sales to 1,33,958 units in September. The company had sold a total of 1,24,328 motorcycles in September 2025. Domestic sales during the previous month stood at 1,21,326 units, from 1,13,573 motorcycles retailed in the same month last year, registering a growth of 7%. Exports for the month under review were recorded at 12,632 motorcycles, up 17% from 10,755 units retailed in the overseas market in September 2025.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INFY	1035.00	994.10	4.11%
HDFCLIFE	534.20	521.20	2.49%
HDFCBANK	721.20	708.70	1.76%
SBILIFE	1721.60	1696.40	1.49%
MAXHEALTH	940.95	929.80	1.20%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
BAJAJ-AUTO	10045.00	10874.00	-7.62%
MARUTI	11386.00	11967.00	-4.86%
SHRIRAMFIN	945.00	982.70	-3.84%
TATASTEEL	178.00	184.30	-3.42%
ADANIPORTS	1737.80	1798.30	-3.36%

(Source: [Moneycontrol](#))

- **Adani Ports and Special Economic Zone** has successfully completed the expansion of the Colombo West International Terminal. This expansion doubled the terminal's capacity to 3.2 million TEUs following a USD 750 million investment. Sri Lankan Prime Minister Dr. Harini Amarasuriya inaugurated the expanded facility, emphasizing its significance for the country's economy.

- **Escorts Kubota** reported 16.7% fall in tractor sales in September 2026, selling 15,214 units during the month as against 18,267 units sold in September 2025. Domestic tractor sales fell 16.2% to 14,911 tractors in September 2026 as against 17,803 tractors in September 2025. Export tractor sales in September 2026 were at 303 tractors as against 464 tractors sold in September 2025, down 34.7% YoY.

- **Ashok Leyland** reported total sales of 24,049 units in month of September 2026 compared to 18,813 units in September 2025, recording a growth of 28%. Total sales include domestic sales of 22,157 units, up 29% YoY.

- FSSAI has suspended the licences of two food business operators due to food safety violations. Inspections revealed serious issues at **Shivam Agro** and **TCF Chocolates & Gifts**. Deficiencies included poor sanitation, pest infestations, and improper food handling practices. Both establishments failed to maintain proper food safety records as mandated by regulations. All food business activities must cease during the suspension period.

- **Sterlite Technologies** said its wholly owned subsidiary had received a long-term supply agreement from an international hyperscale partner.

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

Global News

- U.S. economy expanded at an annualized rate of 2.2% in Q2 2026, revised up by 0.7 percentage point from the 2nd estimate, following an upwardly revised 2.5% growth in Q1.
- U.S. ADP private businesses added 90K jobs in September 2026, following a downwardly revised 36K in August.
- U.S. goods trade deficit widened to \$132.6 billion in August 2026 from \$118.9 billion in July.
- U.S. wholesale inventories were estimated to have risen 0.7% month-over-month to \$965.7 billion in August 2026, following a 1.3% increase in July.
- U.S. Chicago Business Barometer climbed to 58.8 in September 2026 from 47.1 in August.
- U.K. S&P Global Manufacturing PMI rose to 51.9 in September 2026, up from 51.7 in August.

- Eurozone's seasonally adjusted unemployment rate stood at 6.4% in August 2026.
- Eurozone S&P Global Manufacturing PMI rose to 52.9 in September 2026, the most since May 2022 and above preliminary estimates of 52.7.
- Germany's annual inflation rate rose to 3.3% in September 2026. The consumer prices increased by 0.6% in September compared with the previous month.
- Germany S&P Global Manufacturing PMI was revised slightly higher to 53.9 in September 2026 from 54.3 in August.
- France S&P Global Manufacturing PMI eased to 50.6 in September 2026 from 51.1 in August.
- Australia's trade surplus narrowed to AUD 0.50 billion in August 2026 from a downwardly revised AUD 1.35 billion surplus in the previous month. Imports grew 5.8% month-on-month to a record high of AUD 46.94 billion, after a downwardly revised 2.4% drop in July while exports rose 3.7% month-on-month to a 29-month high of AUD 47.43 billion in August, rebounding from a revised 3.6% fall in July.
- Japan S&P Global Manufacturing PMI was confirmed at 54.1 in September 2026, easing from 54.9 in the previous month.

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

Economic News

- Crude Oil traded at US\$ 91.89/bbl (IST 17:00).
- INR weakened to Rs. 96.31 from Rs. 95.83 against each US\$ resulting in daily change of 0.50%.
- India's HSBC Manufacturing PMI rose to 55.1 in September 2026 from 52.8 in August, revised down from a preliminary estimate of 55.7.
- India's external debt increased by USD 15.4 billion in the quarter, reaching a record high of USD 778.2 billion at the end of June 2026 and surpassing the previous peak of USD 767.3 billion recorded in December 2025.
- The Indian government collected Rs 2,03,521 crore as Gross goods and services tax (GST) for the month of September, up 14.7% % against the same month last year. The cumulative gross collection for the first half of this fiscal (April-Sep), stood at Rs 12,46,278 crore, up 11.6%.
- Starting from October 15, new regulations will limit sugar stock for dealers to 1,000 quintals nationwide. Dealers will only be allowed to hold stocks for a maximum of 15 days. Kolkata and Assam will have a higher limit of 2,000 quintals due to regional needs. The Government expects retail sugar prices to decline further as ex-mill prices stabilize.

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

Forthcoming Events

Board Meetings as on 03/10/2026

Pashupati Cotspin Limited	Bonus
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Board Meetings as on 05/10/2026

Rentomojo Limited	Financial Results
Steamhouse India Limited	Financial Results
LCC Projects Limited	Financial Results
Ola Electric Mobility Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 05/10/2026

NMDC Limited	Dividend - Re 1 Per Share
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(Source: NSE)

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