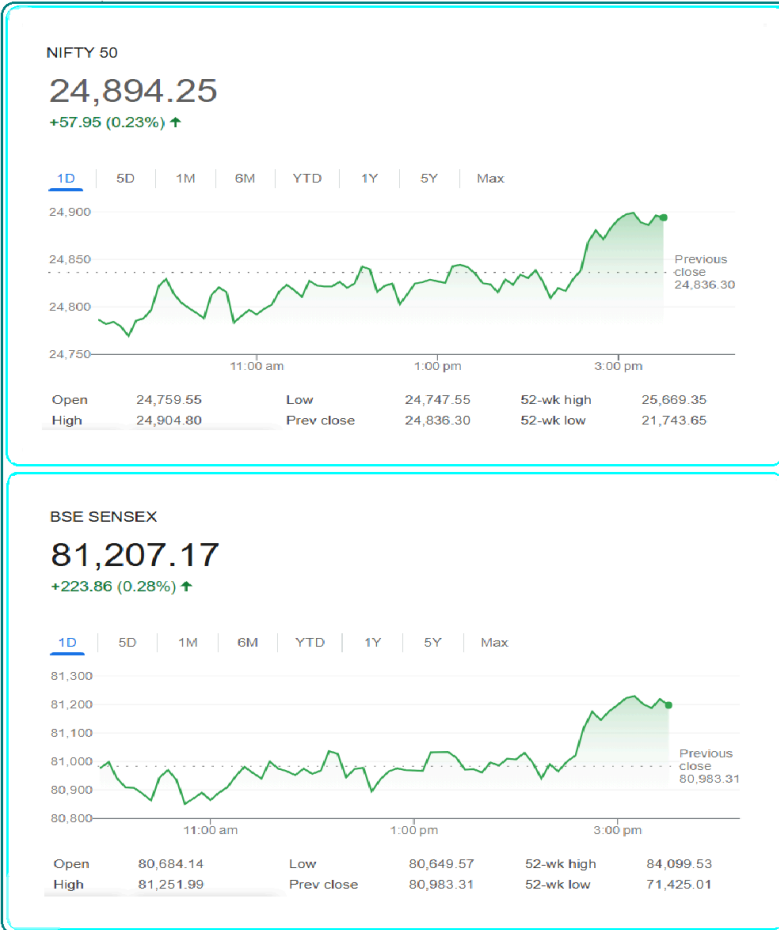


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24894.25	24836.30	0.23%
S&P BSE SENSEX	81207.17	80983.31	0.28%
NIFTY MID100	57503.35	57029.70	0.83%
NIFTY SML100	17878.15	17755.85	0.69%

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

Market Wrap Up

- The headline equity indices ended with modest gains today, marking a second consecutive day of gains as investor sentiment was boosted by the Reserve Bank of India's latest policy announcement and strength in global equities. The Nifty settled above the 24,850 mark.
- The S&P BSE Sensex, jumped 223.86 points or 0.28% to 81,207.17. The Nifty 50 index gained 57.95 points or 0.23% to 24,894.25. In two consecutive trading sessions, the Sensex added 1.17% while the Nifty added 1.15%.
- The S&P BSE Mid-Cap index gained 0.78% and the S&P BSE Small-Cap index rose 1.09%.
- Among the sectoral indices, the Nifty Metal index (up 1.82%), the Nifty PSU Bank index (up 1.12%) and the Nifty Consumer Durables index (up 1.09%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Healthcare index (down 0.22%), the Nifty realty index (down 0.12%) and the Nifty Auto index (down 0.06%) 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 **12244** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **LT, BHARTIARTL, SBIN, BAJFINANCE, INFY**.
- Short** position build up for the **November** series has been witnessed in **RELIANCE, ICICIBANK, HDFCBANK, ETERNAL**.
- Unwinding** position for the **November** series has been witnessed in **LTIM, HEROMOTOCO, NESTLEIND**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55589.25	55347.95	0.44%
NIFTY AUTO	26753.10	26768.65	-0.06%
NIFTY FMCG	55170.60	55105.35	0.12%
NIFTY IT	33949.75	33905.20	0.13%
NIFTY METAL	10277.10	10092.95	1.82%
NIFTY PHARMA	21756.35	21733.50	0.11%
NIFTY REALTY	876.10	877.15	-0.12%
BSE CG	69458.21	68758.50	1.02%
BSE CD	58648.74	57981.85	1.15%
BSE Oil & GAS	27093.84	26946.03	0.55%
BSE POWER	6808.56	6764.23	0.66%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	45769.50	44936.73	1.85%
HANG SENG	27140.92	27287.12	-0.54%
STRAITS TIMES	4411.95	4395.21	0.38%
SHANGHAI	3882.78	3862.53	0.52%
KOSPI	3549.21	3455.83	2.70%
JAKARTA	8118.30	8071.08	0.59%
TAIWAN	26761.06	26378.39	1.45%
KLSE COMPOSITE	1635.06	1620.87	0.88%
ALL ORDINARIES	9288.10	9240.30	0.52%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	112827.66	99744.74
NSE F&O	140693.38	147336.27

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1583.37

(Source: [NSE](#))

Corporate News

- Hero MotoCorp** said that it has dispatched 6,87,220 motorcycles and scooters in September 2025. The company's two-wheeler dispatches in the same period last year were 6,37,050 vehicles. Domestic sales for the period under review aggregated to 6,47,582 vehicles (up 5% YoY) and exports added up to 39,638 vehicles (up 94.83% YoY).
- TVS Motor Company** said that it has recorded monthly sales of 5,41,064 units in September 2025 with a growth of 12% as against 4,82,495 units in the month of September 2024. Total two-wheelers registered a growth of 11% with sales increasing from 4,71,792 units in September 2024 to 5,23,923 units September 2025. Domestic two-wheeler registered growth of 12% with sales increasing from 3,69,138 units in September 2024 to 4,13,279 units in September 2025. The Company's total exports registered a growth of 10% with sales increasing from 1,11,007 units in September 2024 to 1,22,108 units in September 2025.
- Ashok Leyland** reported a 9% increase in total commercial vehicle sales to 18,813 units in September 2025, up from 17,233 units sold in September 2024. The company's total domestic sales rose 7% year-on-year to 17,209 units in September 2025. Domestic sales of medium and heavy commercial vehicles (M&HCV) increased 3% to 10,499 units, while light commercial vehicle (LCV) sales grew 15% to 6,710 units in September 2025 compared to the same month last year.
- Ceigall India**, in a joint venture with JSP Projects, has secured a Rs 509.20 crore infrastructure project from the Greater Mohali Area Development Authority (GMADA). The contract involves constructing internal roads and associated civil, public health, and electrical works in Mohali, to be completed within 24 months. This project aims to enhance connectivity and sustainable urban development.
- Panacea Biotech** received a letter of award (LoA) from United Nations International Children's Emergency Fund (UNICEF) for supply of bivalent oral polio vaccine (bOPV).
- Rail Vikas Nigam** emerges as the Lowest Bidder (L1) from Western Railway for Rs 40.41 crore contract for strengthening of S&T maintenance activities by providing

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TATASTEEL	173.21	167.51	3.40%
POWERGRID	289.70	280.65	3.22%
HINDALCO	780.35	765.95	1.88%
AXISBANK	1181.00	1159.50	1.85%
KOTAKBANK	2100.50	2063.30	1.80%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
MAXHEALTH	1069.20	1113.20	-3.95%
COALINDIA	383.35	388.50	-1.33%
EICHERMOT	6941.00	7021.50	-1.15%
TECHM	1400.60	1416.00	-1.09%
MARUTI	15806.00	15965.00	-1.00%

(Source: [Moneycontrol](#))

- **Larsen & Toubro's** Buildings & Factories (B&F) vertical of Larsen & Toubro has recently secured major orders in India. According to the company's project classification the value of the orders ranges between Rs 5,000 crore to Rs 10,000 crore.
- **Adani Ports and Special Economic Zone** reported handling 41.6 MMT of cargo in September 2025, marking an 11% year-on-year (YoY) increase, primarily driven by a 14% YoY growth in container volumes.
- **Rites** has announced that it has received a work order worth Rs 36.22 crore from Damodar Valley Corporation (DVC).

round the clock manpower for maintenance, repair and upkeep of signaling and telecom gears installed at various locations of Ahmedabad Division for two years.

- **Canara HSBC Life Insurance Company**, a subsidiary of **Canara Bank** has received approval from SEBI for UDRHP ('Updated Draft Red Herring Prospectus') on 02 October 2025.
- **Patanjali Foods** announced that as part of Investment Promotion Activity for World Food India 2025, the Company has signed a non-binding MOU with the Ministry of Food Processing Industries, Government of India, for an investment of up to Rs. 1,000 crore.
- **Tata Power Company** has announced that its subsidiary, Tata Power Renewable Energy (TPREL), has signed a power purchase agreement (PPA) with Tata Power Mumbai Distribution for an 80 MW Firm and dispatchable renewable energy (FDRE) project.
- **Paras Defence and Space Technologies's** subsidiary, Paras Anti-Drone Technologies has received a significant order from the Ministry of Defence, Government of India, valued at approximately Rs 46.19 crore.
- **Crompton Greaves Consumer Electricals** said that it has received a letter of award from Madhya Pradesh Urja Vikas Nigam for a project valued at Rs 4.75 crore.
- **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.

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

Global News

- U.S. ADP said private sector employment fell by 32,000 jobs in September after dipping by a revised 3,000 jobs in August.
- U.S. S&P Global manufacturing PMI eased to 52 in September 2025 from an over three-year high of 53 in August.
- U.S. ISM said its manufacturing PMI edged up to 49.1 in September from 48.7 in August.
- Eurozone jobless rate climbed marginally to 6.3% in August from 6.2% in July.
- Eurozone industrial producer prices declined 0.3% month-on-month in August 2025. On a yearly basis, producer prices fell 0.6% in August.
- Eurozone HCOB composite PMI was confirmed at 51.2 in September 2025, edging up from 51.0 in August. The services PMI rose to 51.3 in September 2025 from 50.5 in the previous month.
- Germany's HCOB Composite PMI was revised lower to 52 in September 2025 from a preliminary of 52.4, compared to 50.5 in August. The services PMI was revised sharply down to 51.5 in September 2025 from August's 49.3.
- French industrial production fell by 0.7% month-over-month in August 2025, after a revised 0.1% decline in July.
- France's HCOB composite PMI slipped to 48.1 in September 2025, down from 49.8 in August. The services PMI fell to 48.5 in September 2025, revised down from the initial estimate of 48.9.
- Australia's goods trade surplus narrowed to AUD 1.83 billion in August 2025, down sharply from a downwardly revised AUD 6.61 billion in July. Exports plunged 7.8% month-over-month to a three-month low of AUD 41.86 billion in August, following a downwardly revised 2.5% increase in July. Imports rose 3.2% to a record AUD 40.03 billion, recovering from a revised 2.4% decline in July.
- Japan's jobless rate came in at a seasonally adjusted 2.6% in August, up from 2.3% in July.
- Japan S&P Global Composite PMI registered 51.3 in September 2025, down from 52.1 in the previous month. The services PMI rose to 53.3 in September 2025, above August's 53.1.

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

Economic News

- Crude Oil traded at US\$ 61.07/bbl (IST 17:00).
- INR weakened to Rs. 88.79 from Rs. 88.70 against each US\$ resulting in daily change of 0.10%.
- India's gross goods and services tax collection rose 9.1% year-on-year in September 2025, accelerating from a 6.5% increase in August.
- India's central bank proposed draft rules to ease corporate fundraising in foreign currencies. The Reserve Bank of India

aims to expand the list of eligible borrowers and lenders for external commercial borrowings and simplify restrictions on their usage, making it easier for companies to access overseas funding.

- The government lifted the export ban on de-oiled rice bran, effective immediately, following industry requests to support processors and farmers. India also exempted various agricultural exports, including rice and wheat, to friendly neighbor Bhutan from existing restrictions. A one-time exemption permits 100 tonnes of wheat seed export to Indonesia.
- India's palm oil imports fell to a four-month low in September as refiners opted for cheaper soyoil, leading to a significant jump in soyoil imports. This shift, driven by price differences, is expected to weigh on benchmark Malaysian palm oil futures while supporting U.S. soyoil futures. Comfortable domestic palm oil stocks also contributed to the decline.
- The Centre raised wheat MSP by 6.6% to Rs. 2,585/quintal for 2026-27, ahead of rabi sowing, and set a production target of 119 mt. It also approved a Rs. 11,400 crore six-year mission to boost pulses output by expanding cultivation, distributing seed kits, and promoting high-yield, climate-resilient varieties.

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

Forthcoming Events

Board Meetings as on 04/10/2025

Rategain Travel Technologies Limited	Fund Raising
Visa Steel Limited	Fund Raising

Board Meetings as on 06/10/2025

Muthoot Capital Services Limited	Fund Raising
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(Source: NSE)

Corporate Actions as on 06/10/2025

Cybertech Systems And Software Limited	Special Dividend - Rs 20 Per Share
Sigma Solve Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Re 1/- Per Share

(Source: NSE)

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