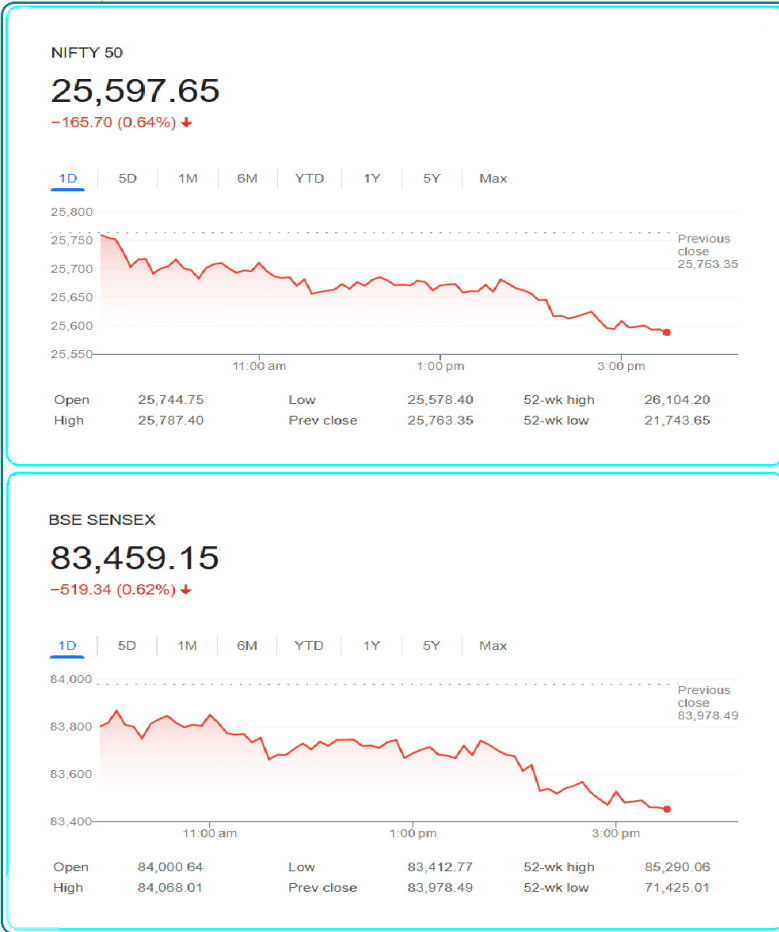


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25597.65	25763.35	-0.64%
S&P BSE SENSEX	83459.15	83978.49	-0.62%
NIFTY MID100	60037.20	60287.40	-0.42%
NIFTY SML100	18360.90	18513.40	-0.82%

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

Market Wrap Up

- Key equity benchmarks ended sharply lower today amid broad-based selling pressure. Investors turned cautious ahead of Q2 earnings from Sun Pharmaceutical Industries, Britannia Industries, and Grasim Industries, scheduled for release on Wednesday, 5 November 2025, along with key domestic economic data and global cues. The Nifty ended below the 25,600 level after touching the day's high of 25,787.40 in early trade.
- The S&P BSE Sensex declined 519.34 points or 0.62% to 83,459.15. The Nifty 50 index fell 165.70 points or 0.64% to 25,597.65.
- The S&P BSE Mid-Cap index declined 0.26% and the S&P BSE Small-Cap index shed 0.69%.
- Among the sectoral indices, the Nifty Consumer Durables index (up 0.39%), the Nifty PSU Bank index (down 0.11%) and the Nifty Pharma index (down 0.48%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (down 1.44%), the Nifty IT index (down 1.06%) and the Nifty Auto index (down 0.86%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **16951** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **BHARTIARTL**, **SBIN**, **BAJFINANCE**.
- Short** position build up for the **November** series has been witnessed in **RELIANCE**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- Unwinding** position for the **November** series has been witnessed in **LTIM**, **ICICIPRULI**, **TORNTPHARM**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57827.05	58101.45	-0.47%
NIFTY AUTO	26610.05	26841.80	-0.86%
NIFTY FMCG	55815.60	56153.70	-0.60%
NIFTY IT	35274.55	35653.05	-1.06%
NIFTY METAL	10499.05	10652.80	-1.44%
NIFTY PHARMA	22334.45	22442.60	-0.48%
NIFTY REALTY	961.10	968.65	-0.78%
BSE CG	70385.54	70525.60	-0.20%
BSE CD	60495.36	60426.20	0.11%
BSE Oil & GAS	28795.56	28915.41	-0.41%
BSE POWER	6856.73	6925.19	-0.99%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	51497.20	52411.34	-1.74%
HANG SENG	25952.40	26158.36	-0.79%
STRAITS TIMES	4422.72	4444.33	-0.49%
SHANGHAI	3960.19	3976.52	-0.41%
KOSPI	4121.74	4221.87	-2.37%
JAKARTA	8241.91	8275.08	-0.40%
TAIWAN	28116.56	28334.59	-0.77%
KLSE COMPOSITE	1623.50	1622.42	0.07%
ALL ORDINARIES	9098.20	9182.50	-0.92%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	103983.71	99211.02
NSE F&O	168445.09	159704.05

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1067.01

(Source: [NSE](#))

Corporate News

- **State Bank of India's** Q2 FY26 net profit rose 10% year-on-year to Rs 20,159.7 crore. Net interest income rose 3.3% year-on-year to Rs 42,985 crore from Rs 41,620 crore for the July-September quarter.
- **Mahindra & Mahindra** reported a rise of 18% year-on-year (y-o-y) in standalone net profit for the quarter ended September 2025. The company's profit after tax rose to Rs 4,521 crore in Q2 FY26 from Rs 3,841 crore in Q2 FY25, the Scorpio SUV maker said. The revenue jumped 21% y-o-y to Rs 35,080 crore in the quarter under review from Rs 28,919 crore in the year-ago quarter.
- **Adani Ports and Special Economic Zone Ltd** posted a consolidated net profit of Rs 3,120 crore for the July-September quarter of FY26, up 29% year-on-year, driven by higher sales. Revenue from operations grew 30% to Rs 9,167 crore in Q2 FY26.
- **Adani Enterprise** reported 84% increase in net profit at Rs 3,199 crore for the quarter ended September 30, 2025 on one-time gain of Rs 3,583 crore.
- **Bharat Heavy Electricals** posted net sales at Rs 7,511.80 crore in September 2025 up 14.09% from Rs. 6,584.10 crore in September 2024. Net profit at Rs. 367.67 crore in September 2025 up 280.34% from Rs. 96.67 crore in September 2024.
- **Bharti Airtel** posted consolidated net sales at Rs 52,145.40 crore in September 2025 up 25.73% from Rs. 41,473.30 crore in September 2024. Net profit at Rs. 6,791.70 crore in September 2025 up 89.02% from Rs. 3,593.20 crore in September 2024.
- **Coal India** posted net sales at Rs 296.09 crore in September 2025 down 6.01% from Rs. 315.02 crore in September 2024. Net profit at Rs. 8,342.12 crore in September 2025 up 101.79% from Rs. 4,133.97 crore in September 2024.
- **TATA Consumer Products** posted consolidated net sales at Rs 4,965.90 crore in September 2025 up 17.83% from Rs. 4,214.45 crore in September 2024. Net profit at Rs. 404.46 crore in September 2025 up 10.99% from Rs.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TITAN	3813.50	3724.50	2.39%
BHARTIARTL	2113.30	2074.00	1.89%
BAJFINANCE	1057.00	1043.10	1.33%
M&M	3581.20	3548.90	0.91%
HDFCLIFE	742.45	736.00	0.88%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
POWERGRID	279.05	288.00	-3.11%
ETERNAL	313.00	322.60	-2.98%
ADANIENT	2396.90	2467.00	-2.84%
COALINDIA	377.55	388.55	-2.83%
TMPV	406.50	417.00	-2.52%

(Source: [Moneycontrol](#))

- **Escorts Kubota's** consolidated net profit declined 1.87% to Rs 318.16 crore in Q2 FY26 as against Rs 324.23 crore posted in Q2 FY25. However, revenue from operations jumped 22.58% year on year (YoY) to Rs 2,791.56 crore in the quarter ended 30 September 2025.
- **Hero MotoCorp** reported total dispatches of 635,808 motorcycles and scooters in October 2025, down 6.37% from 679,091 units in October 2024. Domestic sales for the period under review aggregated to 604,829 vehicles (down 7.99% YoY), while exports added up to 30,979 vehicles (up 42.83% YoY).
- **Indus Towers's** promoter **Bharti Airtel** received approval to increase its ownership in the tower infrastructure company.
- **Glenmark Pharmaceuticals** announced that its subsidiary, Glenmark Pharmaceuticals Inc., USA, is set to launch its 8.4% Sodium Bicarbonate Injection USP, 50 mEq/50 mL (1 mEq/mL) single-dose vial in the United States.

364.42 crore in September 2024.

- **Power Grid Corporation of India** posted consolidated net sales at Rs 11,475.95 crore in September 2025 up 1.76% from Rs. 11,277.76 crore in September 2024. Net profit at Rs. 3,566.08 crore in September 2025 down 5.98% from Rs. 3,793.02 crore in September 2024.
- **Titan Company** posted consolidated net sales at Rs 18,725.00 crore in September 2025 up 28.84% from Rs. 14,534.00 crore in September 2024. Net profit at Rs. 1,120.00 crore in September 2025 up 59.09% from Rs. 704.00 crore in September 2024.
- **Kansai Nerolac Paints** posted consolidated net sales at Rs 1,954.18 crore in September 2025 up 0.14% from Rs. 1,951.37 crore in September 2024. Net profit at Rs. 134.93 crore in September 2025 up 9.89% from Rs. 122.79 crore in September 2024.
- **Suzlon Energy Ltd** reported consolidated net profit surging more than six-fold to Rs 1,279 crore from Rs 201 crore a year earlier. Revenue from operations jumped 85% year-on-year to Rs 3,866 crore.
- **Jindal Steel** posted consolidated net sales at Rs 12,108.60 crore in September 2025 up 5.26% from Rs. 11,503.98 crore in September 2024. Net profit at Rs. 920.67 crore in September 2025 up 2.94% from Rs. 894.35 crore in September 2024.
- **Ajanta Pharma** posted consolidated net sales at Rs 1,353.73 crore in September 2025 up 14.08% from Rs. 1,186.64 crore in September 2024. Net profit at Rs. 260.19 crore in September 2025 up 20.19% from Rs. 216.48 crore in September 2024.
- **Wockhardt** posted consolidated net sales at Rs 782.00 crore in September 2025 down 3.34% from Rs. 809.00 crore in September 2024. Net profit at Rs. 78.00 crore in September 2025 up 454.55% from Rs. 22.00 crore in September 2024.

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

Global News

- U.S. S&P Global US Manufacturing PMI rose to 52.5 in October 2025, up from 52.0 in September.
- U.S. ISM Manufacturing PMI fell to 48.7 in October 2025 from 49.1 in September.
- The Reserve Bank of Australia kept its cash rate unchanged at 3.6% during its November 2025 meeting.
- Japan S&P Global Manufacturing PMI was revised slightly lower to 48.2 in October 2025, down from 48.5 in September.

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

Economic News

- Crude Oil traded at US\$ 60.59/bbl (IST 17:00).
- INR strengthened to Rs. 88.67 from Rs. 88.79 against each US\$ resulting in daily change of 0.14%.
- India and New Zealand have commenced their fourth round of Free Trade Agreement negotiations in Auckland, focusing on trade in goods and services, and rules of origin. Commerce Minister Piyush Goyal is set to meet his New Zealand counterpart this week to review the ongoing progress. Both nations aim to resolve outstanding issues for an early conclusion of the FTA.
- India and the European Union are holding talks to finalize a free trade agreement. Discussions focus on trade in goods, services, and other key areas. European negotiators are in Delhi for these important discussions. Both sides aim for a balanced and equitable framework. This engagement reaffirms a commitment to a comprehensive trade deal.
- India is set to expedite approvals for importing goods from China and other nations, including electronics and steel, signaling a thaw in relations. This move aims to boost local supply and meet surging consumer demand, especially after recent GST cuts. The government is re-evaluating mandatory certifications for overseas plants to ease supply chain disruptions and support domestic industries facing stockouts.
- Central banks globally ramped up gold purchases in the third quarter of this calendar year, acquiring a net 220 tonnes of the yellow metal, or a 28% increase from the previous quarter, showed the World Gold Council's (WGC) latest Gold Demand Trends Q3 2025.
- Rice prices have dropped considerably after the festive season. This is due to a larger kharif crop harvest this year. Common non-basmati rice prices are down, and specialty varieties like Gobindobhog have seen a sharp fall. Basmati prices have also decreased. Exporters are exploring new markets like Japan and Indonesia. Ample supply is expected to keep prices stable for months.
- India's Russian oil imports saw a slight increase in October. However, these shipments are set to decrease starting November. This shift follows new US sanctions targeting major Russian oil producers. Indian refiners are pausing new orders and seeking alternative supplies. Some companies have already stopped Russian oil purchases.

- India's urea imports surged to 58.62 lakh tonnes between April and October this year, more than doubling from the previous year to meet rising domestic demand. The government ensured adequate fertilizer supply for the kharif season, with availability exceeding projected requirements and sales reaching 193.20 lakh tonnes.

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

Forthcoming Events

Board Meetings as on 05/11/2025

Sun Pharmaceutical Industries Limited	Financial Results
Britannia Industries Limited	Financial Results
BEML Limited	Financial Results
Aurobindo Pharma Limited	Financial Results
Grasim Industries Limited	Financial Results
Blue Star Limited	Financial Results
Accelya Solutions India Limited	Financial Results
Allcargo Gati Limited	Financial Results
Asahi India Glass Limited	Financial Results
Astral Limited	Financial Results/Dividend
Avanti Feeds Limited	Financial Results
Bharat Seats Limited	Financial Results
CMS Info Systems Limited	Financial Results
CSB Bank Limited	Financial Results
DCM Shriram Industries Limited	Financial Results
Deepak Fertilizers and Petrochemicals Corporation Limited	Financial Results
Delhivery Limited	Financial Results
Godrej Agrovet Limited	Financial Results
Gujarat Pipavav Port Limited	Financial Results/Dividend
Gulf Oil Lubricants India Limited	Financial Results
Honeywell Automation India Limited	Financial Results
INOX India Limited	Financial Results
MAS Financial Services Limited	Financial Results
Mindspace Business Parks REIT	Financial Results
Motherson Sumi Wiring India Limited	Financial Results
Mtar Technologies Limited	Financial Results
Muthoot Microfin Limited	Financial Results
NIIT Learning Systems Limited	Financial Results
Orient Green Power Company Limited	Financial Results
Piramal Pharma Limited	Financial Results
Praj Industries Limited	Financial Results

Procter & Gamble Health Limited	Financial Results/Dividend
R. S. Software (India) Limited	Financial Results
Ramco Industries Limited	Financial Results
Redington Limited	Financial Results
Saregama India Limited	Financial Results/Dividend
Savita Oil Technologies Limited	Financial Results
Syngene International Limited	Financial Results
Teamlease Services Limited	Financial Results
The Ramco Cements Limited	Financial Results
Tracxn Technologies Limited	Financial Results
Tube Investments of India Limited	Financial Results
Updater Services Limited	Financial Results
Vinati Organics Limited	Financial Results
Welspun Investments and Commercials Limited	Financial Results
Zee Learn Limited	Financial Results
Zyduz Wellness Limited	Financial Results

Board Meetings as on 06/11/2025

Apollo Hospitals Enterprise Limited	Financial Results
Lupin Limited	Financial Results
ABB India Limited	Financial Results
Bajaj Housing Finance Limited	Financial Results
Amara Raja Energy & Mobility Limited	Financial Results/Dividend
BIRLASOFT LIMITED	Financial Results/Dividend
GlaxoSmithKline Pharmaceuticals Limited	Financial Results
GMM Pfaudler Limited	Financial Results/Dividend
Godrej Properties Limited	Financial Results
Indigo Paints Limited	Financial Results
UPL Limited	Financial Results
Aarti Industries Limited	Financial Results
Action Construction Equipment Limited	Financial Results
Ajmera Realty & Infra India Limited	Financial Results/Stock Split
Akzo Nobel India Limited	Financial Results
Amber Enterprises India Limited	Financial Results
Aster DM Healthcare Limited	Financial Results
Balmer Lawrie & Company Limited	Financial Results
Bliss GVS Pharma Limited	Financial Results
Bombay Dyeing & Mfg Company Limited	Financial Results
Cholamandalam Investment and Finance Company Limited	Financial Results
Clean Science and Technology Limited	Financial Results
Crompton Greaves Consumer Electricals Limited	Financial Results

Cummins India Limited	Financial Results
Dam Capital Advisors Limited	Financial Results
Devyani International Limited	Financial Results
Embassy Developments Limited	Financial Results
Flair Writing Industries Limited	Financial Results
Foseco India Limited	Financial Results
Ganesh Consumer Products Limited	Financial Results/Dividend
Genus Power Infrastructures Limited	Financial Results
GPT Infraprojects Limited	Financial Results
Gulshan Polyols Limited	Financial Results
Happy Forgings Limited	Financial Results
Harsha Engineers International Limited	Financial Results
HCL Infosystems Limited	Financial Results/Fund Raising
Hexaware Technologies Limited	Financial Results
Highway Infrastructure Limited	Financial Results
Hikal Limited	Financial Results
Hind Rectifiers Limited	Financial Results
Hindustan Construction Company Limited	Financial Results
Igarashi Motors India Limited	Financial Results
Indoco Remedies Limited	Financial Results
Interarch Building Solutions Limited	Financial Results
Jagran Prakashan Limited	Financial Results
Jay Bharat Maruti Limited	Financial Results
JK Lakshmi Cement Limited	Financial Results
JM Financial Limited	Financial Results/Dividend
Kaveri Seed Company Limited	Financial Results/Dividend
Life Insurance Corporation Of India	Financial Results
Linde India Limited	Financial Results
Mankind Pharma Limited	Financial Results
Minda Corporation Limited	Financial Results
NCC Limited	Financial Results
Nesco Limited	Financial Results
NHPC Limited	Financial Results
Nilkamal Limited	Financial Results
NRB Industrial Bearings Limited	Financial Results
Ola Electric Mobility Limited	Financial Results
Paisalo Digital Limited	Fund Raising
Paradeep Phosphates Limited	Financial Results
Procter & Gamble Hygiene and Health Care Limited	Financial Results/Dividend
Protean eGov Technologies Limited	Financial Results
Radiant Cash Management Services Limited	Financial Results
Rain Industries Limited	Financial Results
RSWM Limited	Financial Results

Sai Life Sciences Limited	Financial Results
Senores Pharmaceuticals Limited	Financial Results
Shree Renuka Sugars Limited	Financial Results
Smartworks Coworking Spaces Limited	Financial Results
Sterlite Technologies Limited	Financial Results
Sundaram Clayton Limited	Financial Results
Suryoday Small Finance Bank Limited	Financial Results/Fund Raising
Symphony Limited	Financial Results/Dividend
Triveni Engineering & Industries Limited	Financial Results
V.S.T Tillers Tractors Limited	Financial Results
Wonderla Holidays Limited	Financial Results
Zydus Lifesciences Limited	Financial Results/Fund Raising

(Source: NSE)

Corporate Actions as on 06/11/2025

Hindustan Petroleum Corporation Limited	Interim Dividend - Rs 5 Per Share
Nippon Life India Asset Management Limited	Interim Dividend - Rs 9 Per Share
TD Power Systems Limited	Interim Dividend - Re 1 Per Share

(Source: NSE)

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