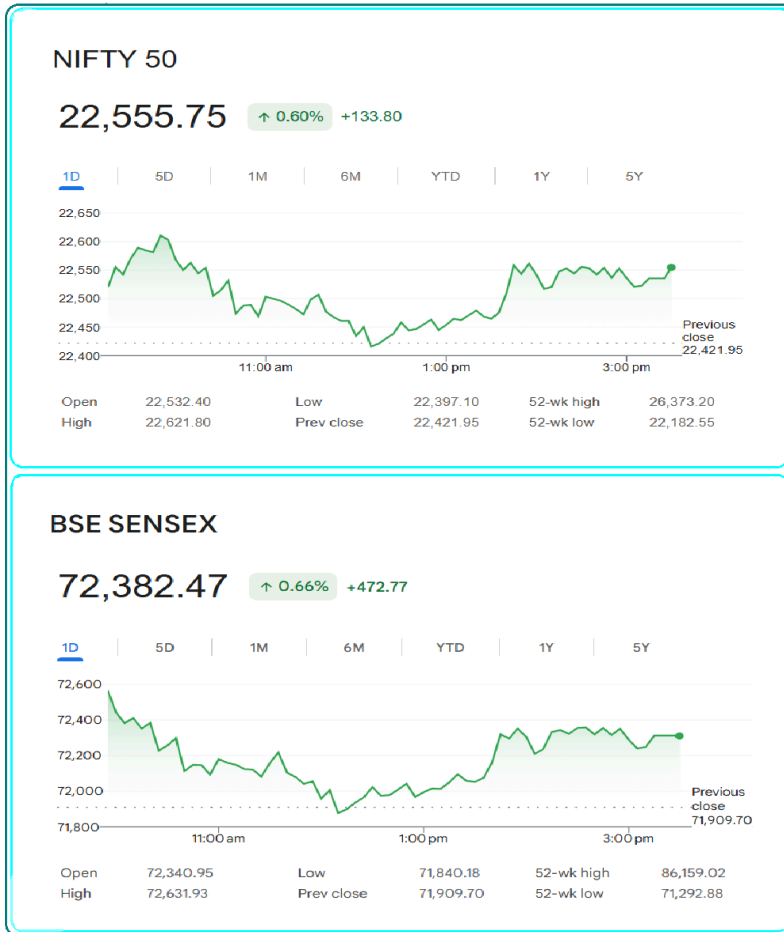


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22555.75	22421.95	0.60%
S&P BSE SENSEX	72382.47	71909.70	0.66%
NIFTY MID100	59123.65	58732.00	0.67%
NIFTY SML100	19149.10	19058.65	0.47%

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

Market Wrap Up

- The key equity benchmarks ended with modest gains, snapping a four-session losing streak, as buying interest emerged across select sectors. The Nifty settled above the 22,550 mark. Investors remained focused on the upcoming Reserve Bank of India (RBI) monetary policy meeting outcome later this week. Market participants will also track movements in global Treasury yields and the US Federal Reserve's policy trajectory for cues on the future path of interest rates.
- The S&P BSE Sensex jumped 472.77 points or 0.66% to 72,382.47. The Nifty 50 index rose 133.80 points or 0.60% to 22,555.75. In the past four consecutive trading sessions, the Sensex and Nifty declined 2.69% and 3.11%, respectively. The BSE 150 MidCap Index gained 0.38% and the BSE 250 SmallCap Index added 0.31%. Among the sectoral indices, the Nifty FMCG index (up 1.80%), the Nifty Consumer Durables index (up 1.53%) and the Nifty PSU Bank index (up 0.97%) outperformed the Nifty 50 index. Meanwhile, the Nifty Healthcare index (down 1%), the Nifty Pharma index (down 0.74%) and the Nifty IT index (down 0.01%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **October** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **57** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **RELIANCE**, **ONGC**, **BHARTIARTL**, **SBIN**, **ICICIBANK**.
- Short** position build up for the **October** series has been witnessed in **HDFCBANK**, **INFY**.
- Unwinding** position for the **October** series has been witnessed in **BAJFINANCE**, **BRITANNIA**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54714.10	54450.75	0.48%
NIFTY AUTO	25421.90	25384.95	0.15%
NIFTY FMCG	44579.65	43789.85	1.80%
NIFTY IT	28301.65	28304.70	-0.01%
NIFTY METAL	12498.00	12460.70	0.30%
NIFTY PHARMA	26117.10	26311.55	-0.74%
NIFTY REALTY	839.70	835.00	0.56%
BSE CG	74416.73	74133.26	0.38%
BSE CD	58286.25	57809.46	0.82%
BSE Oil & GAS	24636.22	24621.74	0.06%
BSE POWER	7182.93	7144.98	0.53%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	69946.86	68309.46	2.40%
HANG SENG	24040.34	23972.29	0.28%
STRAITS TIMES	5664.33	5634.82	0.52%
SHANGHAI	CLOSED	CLOSED	-
KOSPI	CLOSED	7003.74	-
JAKARTA	6118.86	6036.89	1.36%
TAIWAN	49712.04	48475.74	2.55%
KLSE COMPOSITE	1631.75	1630.87	0.05%
ALL ORDINARIES	8859.20	8854.70	0.05%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	116072.86	131806.96
NSE F&O	151360.71	144948.23

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4699.14

(Source: [NSE](#))

Corporate News

- **Larsen & Toubro's** Power Transmission & Distribution business has won multiple EPC orders worth Rs. 10,000-15,000 crore across India, Saudi Arabia and the UAE. The projects include 380 kV transmission and substation works in Saudi Arabia, 132/11 kV substations and cabling in the UAE, and a transmission system of lines and substations in Visakhapatnam.
- **Larsen & Toubro** is in talks with Japan's Itochu Corporation for equity participation in its wholly owned clean energy arm, alongside a green ammonia offtake partnership. L&T is developing a 300,000-tonne-a-year project at Kandla, Gujarat, which it sees as a strategic export hub for green hydrogen derivatives.
- **Jindal Stainless** and **Indian Oil** have renewed their lubricant supply partnership for another five years, extending their vendor-managed inventory arrangement at the Hisar unit. The companies said the renewed agreement will support equipment reliability, operational efficiency and energy supplies while opening scope for deeper technical cooperation.
- **UltraTech** has become the first Indian company to cross 2 GW of captive green power capacity with a recent commissioning of a 116.55-MW wind energy project in Barmer, Rajasthan. Additionally, the company has added 10 MW of Waste Heat Recovery System capacity at its Karnataka unit. UltraTech's current green energy capacity now meets approximately 48 percent of its power requirements across operations.
- **Bharat Forge** has secured a long-term contract from Pratt & Whitney Canada to supply mission-critical aerospace engine components. The components will be manufactured at Bharat Forge's aerospace facility in India.
- **Hindalco Industries** has scrapped its \$125 million acquisition of US-based speciality alumina maker AluChem Companies after prolonged delays in closing the deal.
- **Coal India Limited** reported 11.01% increase in dry fuel supplies to the power sector for Q2, aimed at satisfying the electricity needs arising from the festive season. Furthermore, coal production surged by 9.18% in

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ITC	268.90	255.90	5.08%
TMPV	288.65	279.40	3.31%
SHRIRAMFIN	971.40	945.00	2.79%
BAJFINANCE	970.00	948.30	2.29%
BHARTIARTL	1779.90	1741.10	2.23%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1201.90	1243.10	-3.31%
MAXHEALTH	917.00	940.95	-2.55%
HDFCBANK	704.80	721.20	-2.27%
APOLLOHOSP	7985.00	8133.50	-1.83%
ASIANPAINT	2366.00	2407.00	-1.70%

(Source: [Moneycontrol](#))

- **Airtel** Business launched Airtel IQ Gateway, India's first ever telco-grade network intelligence platform which brings different customer communication channels onto one safe control plane.
- **Tata Motors Passenger Vehicles**'s wholly owned subsidiary, Jaguar Land Rover (JLR), reported a 24.54% year-on-year (YoY) increase in wholesales to 82,400 units in Q2 FY27 from 66,165 units in Q2 FY26.
- **Ramco Systems** has announced that its wholly owned subsidiary, Ramco Systems FZ-LLC, has entered into a partnership with Altron, a South African technology group operating across the United Arab Emirates and the Kingdom of Saudi Arabia through Altron Middle East Technologies LLC and Altron Alarabia Company. Under the agreement, Altron will offer Ramco Payce to its enterprise customers.

September, reflecting a boost in operational efficiency. Union Minister G Kishan Reddy confirmed the absence of a coal shortage.

- Maharashtra's Food and Drug Administration has cancelled **Cipla Pharma**'s distribution licenses due to serious violations. The FDA discovered irregularities with Reactin Plus Tablets, including misbranding and unsafe storage practices. Following inspections, it was revealed that expired medicines were stored incorrectly without proper documentation. The licensing authority's decision was based on findings from earlier proceedings and legal directions.
- **ITCONS E-Solutions** has bagged a new contract by the Employees Provident Fund Organisation (EPFO), Ministry of Labour and Employment to provide 48 resources for a period of One (1) year. The total contract value is Rs 1.92 crore.
- **Raymond Realty** reported a 98% year-on-year (YoY) increase in pre-sales to Rs 902 crore in Q2 FY27, compared with Rs 455 crore in Q2 FY26.
- **Coforge** introduced its intent engineering framework, a practical design methodology that helps enterprises build agentic AI systems aligned to business outcomes, governance requirements, and operational realities.
- **Adani Ports & Special Economic Zone** achieved handled cargo volumes of 46 MMT (up 11% YoY), led by containers (up 15% YoY) in the month of September 2026.
- **SEAMEC** announced that the ONGC owned Vessel "SAMUDRA PRABHA" managed by SEAMEC is recused from its project with effect from 05 October 2026 at 04:00 hrs to undertake its statutory drydocking.
- Onix IPP, a subsidiary of **Bondada Engineering**, has received a sanction of Rs 911.25 crore from State Bank of India for financing a 225 MW Solar Independent Power Producer (IPP) Project.

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

Global News

- U.S. initial jobless claims slipped to 197,000 in the week ended September 26th, a decrease of 1,000 from the previous week's revised level of 198,000. Continuing claims fell by 11,000 to 1.701 million in the week ended September 19, the lowest since April 2023.
- U.S. non-farm payroll employment rose by 29,000 jobs in September after jumping by a downwardly revised 133,000 jobs in August. Private nonfarm payrolls increased by 46,000 in September of 2026. The unemployment rate rose to 4.2% in September 2026, up from 4.1% in August.
- U.S. S&P Global Manufacturing PMI fell to 55.9 in September 2026 from a preliminary estimate of 57.0, but remained above August's 53.9.
- U.S. ISM Manufacturing PMI edged down to 54.5 in September 2026 from 54.6 in August.
- U.S. factory orders crept up by 0.1% in August after climbing by a downwardly revised 0.8% in July.
- U.K. S&P Global Composite PMI came at 52.0 in September 2026, down from 52.5 in August. The services PMI was revised slightly higher to 52.1 in September 2026, slightly below August's 52.5.
- Eurozone annual inflation accelerated to 3.8% in September 2026, up from 3.2% in August. Core inflation rose to 2.5% from 2.4%, in line with expectations.
- Eurozone producer prices rose 1.9% from the previous month in August 2026, the most since March, following a 1.6% increase in July. From the previous year, producer inflation accelerated to 8.2% from 5.8% in the previous month, the highest since February 2023.
- Eurozone S&P Global Composite PMI rose to 53.1 in September 2026 from 52 in August. The services PMI rose to 53.0 in September 2026 from 51.6 in August.
- Eurozone Sentix investor morale index fell to 2.7 points in October from 5.1 points in September.
- Germany S&P Global Composite PMI rose to 53.8 in September 2026 from 51.8 in August. The services PMI climbed to a 7-month high of 52.9 in September 2026 from 49.7 in August
- France S&P Global Composite PMI was revised slightly down to 51.1 in September 2026 from a preliminary estimate of 51.2 but was up from 48.5 in August. The services PMI stood at 51.2 in September 2026, rising from 48.0 in August.
- Japan's unemployment rate inched up to 2.5% in August 2026 from July's 12-month low.
- Japan's S&P Global Composite PMI Business Activity Index eased to 52.3 in September 2026 from 53.5 the previous month. The services PMI Business Activity Index stood at 51.3 in September 2026, down from a flash reading of 51.6 and August's 52.5.

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

Economic News

- Crude Oil traded at US\$ 90.61/bbl (IST 17:00).
- INR strengthened to Rs. 96.30 from Rs. 96.31 against each US\$ resulting in daily change of 0.01%.
- India and Switzerland have signed a migration and mobility partnership pact and expanded market access for Indian exports. Prime Minister Narendra Modi and Swiss President Guy Parmelin discussed deepening cooperation in nuclear energy and defence. Both nations aim to boost bilateral trade and investment ties following the recent Trade and Economic Partnership Agreement.
- Foreign currency non-resident (FCNR) inflows have provided a significant cushion to the rupee and India's balance of payments (BoP), but a sustained improvement in external stability will eventually depend on the return of foreign institutional investor (FII) flows.
- India's telecom operators are projected to see a 12-15% tariff hike in the next few months. Bharti Airtel, Reliance Jio, and Vodafone Idea Limited are expected to report revenue growth in average revenue per user. Reliance Jio is estimated to add 8 million subscribers, while Bharti Airtel expects to gain 3 million customers. Vodafone Idea is projected to add 1 million subscribers in the same period.

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

Forthcoming Events

Board Meetings as on 06/10/2026

Glass Wall Systems (India) Limited	Financial Results
Kanohar Electricals Limited	Financial Results
Asset Reconstruction Company (India) Limited	Financial Results
Karamtara Engineering Limited	Financial Results
Veegaland Developers Limited	Financial Results

(Source: NSE)

Corporate Actions as on 06/10/2026

BLS E-Services Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 5/- Per Share
Veranda Learning Solutions Limited	Demerger

(Source: NSE)

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