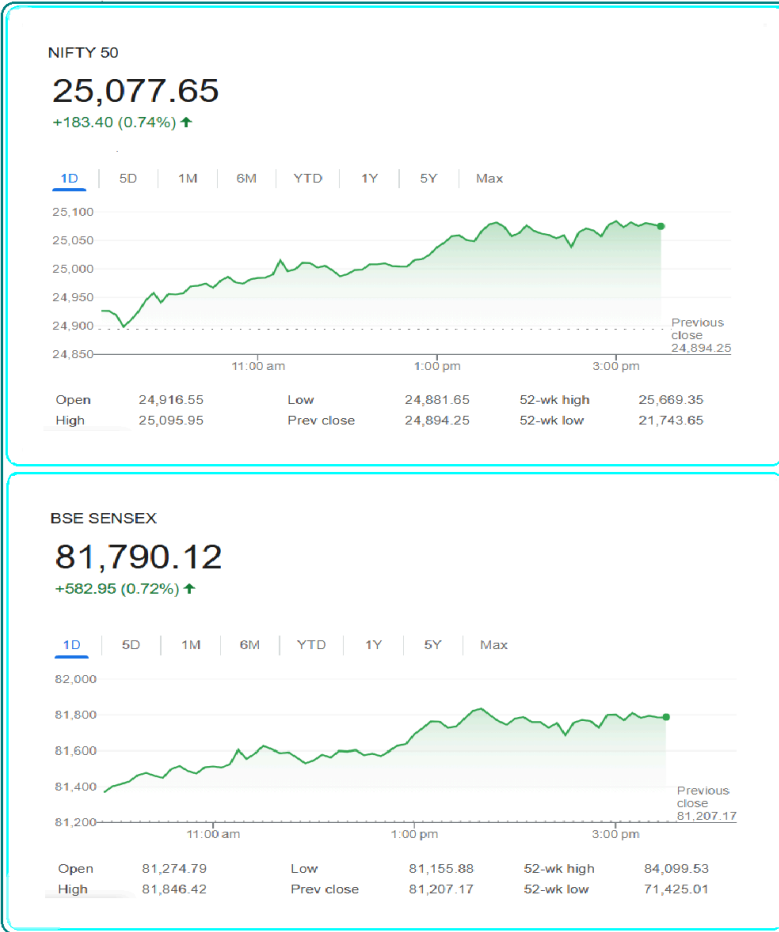


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25077.65	24894.25	0.74%
S&P BSE SENSEX	81790.12	81207.17	0.72%
NIFTY MID100	58015.10	57503.35	0.89%
NIFTY SML100	17928.05	17878.15	0.28%

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

Market Wrap Up

- The headline equity indices ended with significant gains today, supported by the central bank's recent decision to lower its FY26 inflation forecast and raise its GDP growth projection. Investors will monitor the quarterly business updates, IPO activity and the upcoming quarterly earnings season. The Nifty settles above 25,050 mark.
- The S&P BSE Sensex jumped 582.95 points or 0.72% to 81,790.12. The Nifty 50 index gained 183.40 points or 0.74% to 25,077.65. In three consecutive trading sessions, the Sensex and Nifty jumped 1.9%, respectively.
- The S&P BSE Mid-Cap index gained 0.68% and the S&P BSE Small-Cap index shed 0.20%.
- Among the sectoral indices, the Nifty IT index (up 2.28%), the Nifty Healthcare index (up 1.29%) and the Nifty Private Bank index (up 1.22%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 0.90%), the Nifty Metal index (down 0.89%) and the Nifty FMCG index (down 0.20%) 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 **4671** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **RELIANCE, LT, SBIN, HDFCBANK**.
- Short** position build up for the **November** series has been witnessed in **ICICIBANK, ITC, SAIL, TORNTPOWER**.
- Unwinding** position for the **November** series has been witnessed in **HEROMOTOCO, TATAMOTORS, HINDUNILVR, BAJAJFINSV**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56104.85	55589.25	0.93%
NIFTY AUTO	26857.20	26753.10	0.39%
NIFTY FMCG	55057.65	55170.60	-0.20%
NIFTY IT	34722.50	33949.75	2.28%
NIFTY METAL	10185.50	10277.10	-0.89%
NIFTY PHARMA	21779.85	21756.35	0.11%
NIFTY REALTY	882.10	876.10	0.68%
BSE CG	69564.12	69458.21	0.15%
BSE CD	58638.03	58648.74	-0.02%
BSE Oil & GAS	27360.42	27093.84	0.98%
BSE POWER	6798.94	6808.56	-0.14%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	47944.76	45769.50	4.75%
HANG SENG	26957.77	27140.92	-0.67%
STRAITS TIMES	4421.71	4411.95	0.22%
SHANGHAI	CLOSED	3882.78	-
KOSPI	CLOSED	3549.21	-
JAKARTA	8139.89	8118.30	0.27%
TAIWAN	CLOSED	26761.06	-
KLSE COMPOSITE	1638.09	1635.06	0.19%
ALL ORDINARIES	9280.00	9288.10	-0.09%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	96871.84	112827.66
NSE F&O	152317.16	140693.38

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	313.77

(Source: [NSE](#))

Corporate News

- **ONGC** will invest Rs 8,110 crore for oil and gas development. This project covers 172 wells in eight blocks in Andhra Pradesh. An expert committee recommended environmental clearance for the plan. ONGC will follow all environmental protection measures. No wells will be set up near Coringa Wildlife Sanctuary. This ensures ecological safety.
- **HDFC Bank's** average advances under management (including inter-bank participation certificates, bills rediscounted, and securitisation/assignment) stood at Rs 27,94,600 crore for the September 2025 quarter, up approximately 9% from Rs 25,63,900 crore in the same quarter last year. This also marks a 1.9% increase over Rs 27,42,300 crore recorded in the June 2025 quarter.
- **Ujjivan Small Finance Bank** said its total deposits climbed 14.8% year-on-year and 1.2% sequentially to Rs 39,101 crore, supported by a sharp 22.1% rise in CASA deposits to Rs 10,782 crore. Consequently, the CASA ratio improved to 27.6% from 25.9% a year ago, reflecting stronger retail traction. The credit-to-deposit ratio inched up to 88% in September 2025, compared with 87% in September 2024 and 86% in June 2025.
- **Jubilant FoodWorks** said that the company's consolidated revenue from operations was at Rs 2,340.4 crore in Q2 FY26, marking a 19.7% year-on-year (YoY) jump. Revenue from operations advanced 15.8% YoY to Rs 1,698.69 crore in Q2 FY26.
- **Bandhan Bank** has reported 7.2% rise in loans & advances to Rs 140,062 crore as on 30 September 2025 from Rs 130,649 crore as on 30 September 2024. On a sequential basis, the gross advances are higher by 4.8% as compared with Rs 133,625 crore as on 30 June 2025. Total deposits of the bank added up to Rs 157,975 crore as on 30 September 2025, up 10.9% YoY and up 2.1% QoQ.
- **AstraZeneca Pharma India** said that it has received permission from the Central Drugs Standard Control Organisation (CDSCO), to import for sale and distribution of Trastuzumab Deruxtecan 100mg/5mL vial lyophilized powder, under brand name, Enhertu.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
MAXHEALTH	1139.70	1069.20	6.59%
SHRIRAMFIN	671.45	645.80	3.97%
TCS	2988.40	2901.90	2.98%
APOLLOHOSP	7662.00	7449.50	2.85%
TECHM	1439.30	1400.60	2.76%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TATASTEEL	170.06	173.21	-1.82%
ADANIPOORTS	1398.70	1419.10	-1.44%
POWERGRID	286.90	289.70	-0.97%
EICHERMOT	6879.50	6941.00	-0.89%
ITC	400.75	404.30	-0.88%

(Source: [Moneycontrol](#))

- Marico** achieved high single-digit volume growth in Q2 FY26, despite facing transitory disruption from new GST slab implementation and passing benefits to consumers. The company anticipates modest operating profit growth due to channel discounts and high commodity prices. While its international business maintained robust momentum, key domestic brands showed mixed performance.
- Airtel** Business has secured a multi-year contract from the Indian Railway Security Operations Centre (IRSOC) to provide cybersecurity services. The company will design, build, and operate a multi-layered security ecosystem to protect the Indian Railways' IT infrastructure and digital operations, including ticketing, train tracking, and freight management.
- Bank of Maharashtra** reported strong financial performance. Credit growth reached 16.8% in the second quarter. Total advances stood at Rs 2.17 lakh crore. Deposits increased by 12.1% to Rs 3.09 lakh crore. The bank's total business rose 14.2%. CASA ratio improved to 50.35%. These figures reflect robust growth.
- Jindal Stainless** launched its first stainless steel fabrication unit in Patalganga, Mumbai. The facility, built with an investment of Rs 125 crore, will serve the bridge sector. It aims to achieve an 18,000 tonnes annual capacity by FY27.
- Balaji Telefilms** has partnered with Eloelo Group's Story TV to create short-form, mobile-first micro dramas for digital audiences. This collaboration aims to expand India's micro drama ecosystem, potentially a \$5 billion market, by leveraging Balaji's creative expertise for impactful vertical video content. This marks one of India's first large-scale efforts in this format.
- Truhome Finance** is receiving an additional Rs 500 crore from **Warburg Pincus**, bringing total investment to over Rs 2,000 crore. The affordable housing lender plans aggressive growth, targeting Rs 23,000 crore AUM by fiscal end, while maintaining strong asset quality and expanding its tech and branch network, primarily serving the self-employed segment.
- Tata Motors'** Jaguar Land Rover (JLR) is preparing a private loan of up to £500 million (\$674 million) to support its suppliers following a cyberattack in early September that halted production at its global facilities. The loan is separate from a £1.5 billion state-backed guarantee announced last weekend, which has yet to be finalized.
- Torrent Pharmaceuticals** reported receiving demand notices from the NPPA. The notices total over Rs 6.63 crore.
- Ola Electric** has become the first two-wheeler EV manufacturer to receive government certification for its in-house developed rare-earth-free ferrite motor.
- K E C International** has secured new orders of Rs. 1,102 crore across various businesses: Civil business has secured a prestigious order for civil and structural works of a 150 MW thermal power plant from a leading private player in India. Transportation business has secured orders in the prestigious Train Collision Avoidance System (TCAS) segment under 'Kavach' in India. Transmission & Distribution (T&D) business has secured orders for supply of towers, hardware & poles in the Americas and the Middle East. Cables & Conductors business has secured orders for supply of various types of cables and conductors in India and the overseas market.

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

Global News

- U.S. S&P Global composite PMI fell to 53.9 in September 2025, below August's 54.6. The services PMI inched lower to 54.2 in September of 2025 from 54.5 in the previous month.
- U.S. ISM said its services PMI fell to 50.0 in September from 52.0 in August.
- Eurozone retail sales edged up 0.1% month-over-month in August 2025, partially recovering from a revised 0.4% decline in July. On an annual basis, retail trade growth slowed sharply to 1.0% in August.
- Eurozone Sentix investor confidence index rose to -5.4 in October from -9.2 in September.

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

Economic News

- Crude Oil traded at US\$ 61.31/bbl (IST 17:00).
- INR weakened to Rs. 88.79 from Rs. 88.78 against each US\$ resulting in daily change of 0.01%.
- India's seasonally adjusted HSBC composite output index dropped to 61.0 in September from 63.2 in August. The services PMI dropped to 60.9 in September from 62.9 in August.
- India's significant trade deficit with Qatar, primarily due to energy imports, can be reduced through joint ventures in energy infrastructure, technology, and cross-border investments, a think tank suggests. India aims to diversify trade and is pursuing a bilateral agreement to strengthen economic ties.
- The CBIC has mandated a 90% provisional refund for inverted duty structure (IDS) claims filed from October 1, 2025, to alleviate working capital issues for sectors like textiles. This interim measure, similar to zero-rated supplies, follows a GST Council announcement for exporters, though its full implementation may require legal changes.
- System credit growth edged up to 10.3% year-on-year as of September 5, compared with 10% as of August 22, while deposit growth moderated to 9.8% from 10.2% over the same period, according to Reserve Bank of India (RBI) data. The system credit-deposit ratio remained elevated at 79% as of September 2025.

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

Forthcoming Events

Board Meetings as on 07/10/2025

Shringar House of Mangalsutra Limited

Financial Results

(Source: NSE)

Corporate Actions as on 07/10/2025

Sayaji Industries Ltd

Bonus issue 3:1

(Source: NSE)

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