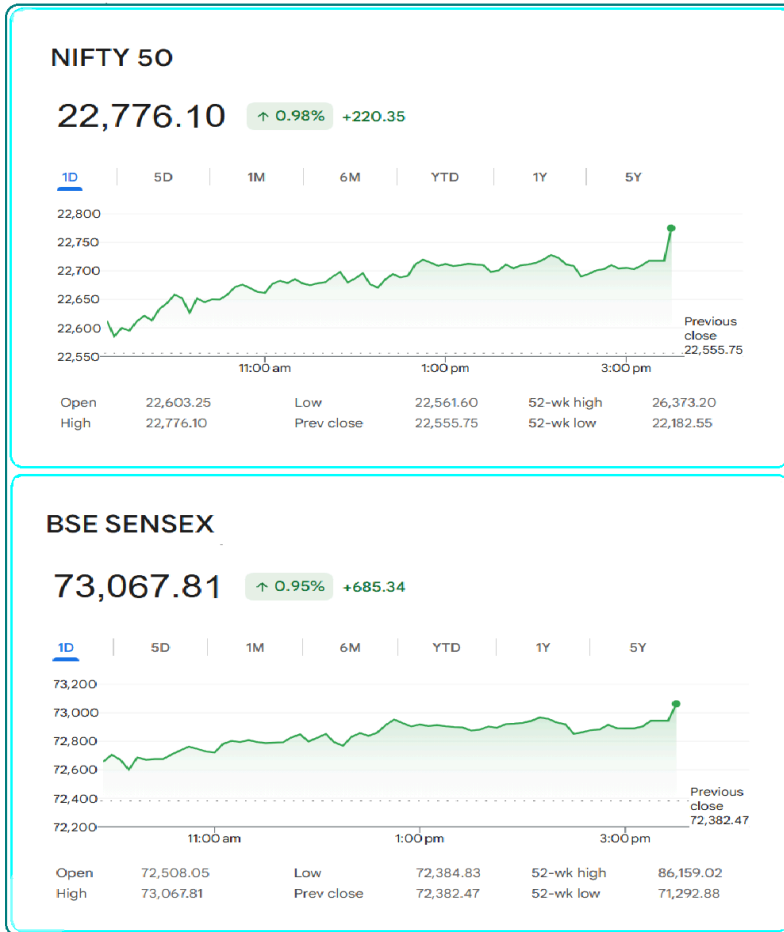


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22776.10	22555.75	0.98%
S&P BSE SENSEX	73067.81	72382.47	0.95%
NIFTY MID100	59761.20	59123.65	1.08%
NIFTY SML100	19448.70	19149.10	1.56%

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

Market Wrap Up

- The key equity indices ended with major gains, extending their gains for a second consecutive session, supported by positive global cues and upbeat quarterly business updates ahead of the Reserve Bank of India's interest rate decision. The Nifty closed above the 22,750 mark.
- The S&P BSE Sensex jumped 685.34 points or 0.95% to 73,067.81. The Nifty 50 index rose 220.35 points or 0.98% to 22,776.10. Over two consecutive sessions, the Sensex and Nifty have jumped 1.61% and 1.58%, respectively.
- The BSE 150 MidCap Index gained 1.23% and the BSE 250 SmallCap Index added 1.38%.
- Among the sectoral indices, the Nifty Pharma index (up 1.66%), the Nifty Oil & Gas bank (up 1.58%), the Nifty private index (up 1.41%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 0.59%), the Nifty realty index (down 0.27%) and the Nifty PSU Bank index (down 0.08%) 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 **2414** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **BHARTIARTL, ICICIBANK, HDFCBANK**.
- Short** position build up for the **October** series has been witnessed in **SBIN, BAJFINANCE, INFY**.
- Unwinding** position for the **October** series has been witnessed in **RELIANCE, GODREJCP**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55128.40	54714.10	0.76%
NIFTY AUTO	25541.95	25421.90	0.47%
NIFTY FMCG	45205.35	44579.65	1.40%
NIFTY IT	28136.05	28301.65	-0.59%
NIFTY METAL	12599.75	12498.00	0.81%
NIFTY PHARMA	26549.60	26117.10	1.66%
NIFTY REALTY	837.45	839.70	-0.27%
BSE CG	75749.86	74416.73	1.79%
BSE CD	58615.87	58286.25	0.57%
BSE Oil & GAS	24935.16	24636.22	1.21%
BSE POWER	7270.02	7182.93	1.21%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	70683.98	69946.86	1.05%
HANG SENG	24280.56	24040.34	1.00%
STRAITS TIMES	5701.54	5664.33	0.66%
SHANGHAI	CLOSED	CLOSED	-
KOSPI	6941.39	7003.74	-0.89%
JAKARTA	6192.93	6118.86	1.21%
TAIWAN	49822.55	49712.04	0.22%
KLSE COMPOSITE	1633.35	1631.75	0.10%
ALL ORDINARIES	8903.50	8859.20	0.50%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	109748.12	116072.86
NSE F&O	135398.93	151360.71

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2961.30

(Source: [NSE](#))

Corporate News

- **Kotak Mahindra Bank** reported strong growth in deposits and advances for the quarter ended 30 September 2026. Total deposits rose 23.2% YoY and 13.7% QoQ to Rs 6,51,491 crore as of 30 September 2026. Average deposits increased 18.8% YoY and 8.5% QoQ to Rs 6,06,234 crore.
- **Trent** reported standalone revenue from operations, excluding GST, rose 23% year on year to Rs 5,788 crore in Q2 FY27 from Rs 4,724 crore in Q2 FY26. Revenue for the first half of FY27 increased 21% to Rs 11,454 crore from Rs 9,505 crore in the corresponding period a year earlier.
- **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.
- **Honasa Consumer** said it expects another strong quarter in Q2 FY27, supported by broad-based growth across its focus categories and brands. The company expects net sales value (NSV) growth in the early-thirties year on year during the quarter, building on the momentum recorded in Q1 FY27.
- Delhi High Court has granted interim relief to **Reliance Industries** against FSSAI's directive on Campa beverages. The court questioned FSSAI for not providing proper notice before the order was issued, which affected the company's operations. Reliance challenged the June directive due to significant business disruption caused by product seizures and delistings. Similar legal challenges from PepsiCo and Monster Beverage are also ongoing in the same context.
- **Adani Power** and Druk Green Power Corporation have signed an agreement to develop the 770-megawatt Chamkharchhu-I Hydroelectric Project. Construction is expected to begin in the first half of 2027 and commissioning will follow six years later. This project aims to enhance Bhutan's energy security and provide surplus power to India during summer months. The partnership will operate under a 49:51 equity model and includes a 30-year concession.
- **PwC** is putting India at the centre of its global consulting strategy by combining its India consulting business with the US firm's India advisory operations into a nearly 40,000-person joint venture. Executives said the move is

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TRENT	2906.00	2580.00	12.64%
KOTAKBANK	431.90	416.00	3.82%
NESTLEIND	1341.40	1297.10	3.42%
HINDUNILVR	1895.20	1838.40	3.09%
JIOFIN	217.90	212.00	2.78%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
COALINDIA	411.65	425.10	-3.16%
TECHM	1504.50	1535.90	-2.04%
MAXHEALTH	902.50	917.00	-1.58%
TMPV	285.80	288.65	-0.99%
ULTRACEMCO	10750.00	10850.00	-0.92%

(Source: [Moneycontrol](#))

- **Lupin Ltd** has launched Formoflo-G MDI, a new inhaler for chronic obstructive pulmonary disease management in India. This fixed-dose inhaler combines three therapies into a single device for better treatment outcomes. It aims to benefit over 55 million people living with COPD across the country. The Drug Controller General of India has approved this innovative product for use. Lupin is currently ranked second in the respiratory therapy segment in India.
- **Cyient** announced the formation of a new, integrated business unit designed to accelerate its technology-led growth: Intelligent Engineering Solutions (IES). IES strengthens the company's ability to translate today's technological capabilities into customer value while building the technologies that will shape tomorrow.

aimed at routing more global consulting work through India, expanding work with GCCs and giving Indian clients greater access to PwC's global capabilities, rather than simply cutting costs.

- **Dabur India** anticipates strong double-digit growth in its consolidated revenues and India FMCG business for the upcoming quarter. Demand conditions have remained steady despite challenges such as inflation and geopolitical tensions affecting operations. The company expects robust performance particularly in its Home & Personal Care and Food and Beverages segments. Modern Trade and emerging distribution channels are also expected to drive growth significantly.
- **KNR Constructions** has transferred its all of the equity share capital in one of its subsidiary company i.e. KNR Ramanattukara Infra (SPV/KRIPL) to Indus Infra Trust (purchaser). The company had invested Rs. 225.72 crore.
- **RailTel Corporation of India** has received the work order worth Rs 48.39 crore from Odisha Primary Education Program Authority (Opepa). The order is for supply, installation, commissioning of tools & equipment and set up of vocational lab.
- **Amber Enterprises India** has incorporated a new wholly owned subsidiary company in India, namely Amber Digital Technologies (Amber Digital).
- **Transrail Lighting** has secured new orders worth Rs 412 crore in its core Transmission & Distribution (T&D) business. Post these new orders, the order intake for the year has grown to Rs 2,021 crore. The Company has further L1 orders totalling to Rs 409 crore.
- **BGR Energy Systems** entered into a Master Restructuring Agreement with National Asset Reconstruction Company (NARCL).

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

Global News

- U.S. S&P Global Composite PMI rose to 58.4 in September 2026 from 56 in August. The services PMI rose to 58.8 in September 2026 from 56.5 in August.
- U.S. ISM Services PMI fell to 54.9 in September 2026 from 55.4 in August.
- Eurozone retail sales inched higher by 0.1% from the previous month in August of 2026, trimming the 0.6% drop in July. From the previous year, retail sales jumped by 0.8%, rebounding from the two-year low increase of 0.4% in July.
- Germany's factory orders plunged 10.6% month-on-month in August 2026, reversing an upwardly revised 3.2% increase in the prior month. On a less volatile three-month basis, factory orders fell 1.3% in June-August from the previous three months.
- France industrial production fell 0.3% month-on-month in August 2026, defying expectations for a 0.3% rise and following a 0.6% decline in July. On a yearly basis, industrial output rose 0.3%, rebounding from a 0.6% fall in July.

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

Economic News

- Crude Oil traded at US\$ 87.47/bbl (IST 17:00).
- INR weakened to Rs. 96.43 from Rs. 96.30 against each US\$ resulting in daily change of 0.13%.
- India's HSBC Composite PMI stood at 55.9 in September 2026, down from a flash reading of 56.6 but up from 54.6 in the previous month. The services PMI was revised lower to 55.2 in September 2026, after a final reading of 54.1 in the previous month.
- The World Bank has upgraded India's economic growth forecast to 7.1% for fiscal 2026-27. This change reflects strong domestic consumption, despite ongoing inflationary pressures. Other major forecasters, including Moody's and S&P Global Ratings, have also revised their projections upward. However, elevated oil prices and potential climate-related challenges pose risks to this outlook.
- The Directorate General for Trade Remedies in India is probing complaints from domestic producers about six imported products from China. Accusations of dumping have led to demands for anti-dumping duties. Additionally, the agency is also assessing Insoluble Sulphur imports.
- The Centre has introduced 375 new permissible works under the Viksit Bharat Guarantee for Rozgar and Ajeevika Mission. The categories include water security, core rural infrastructure, livelihood-related infrastructure, and disaster preparedness. An emphasis has been placed on livelihood infrastructure, with 128 works focused on water security. The revised framework replaces MGNREGA with guaranteed wage employment for rural households each year.

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

Forthcoming Events

Board Meetings as on 07/10/2026

Dishman Carbogen Amcis Limited

Fund Raising

(Source: NSE)

Corporate Actions as on 07/10/2026

PTC India Limited

Dividend - Rs 5.50 Per Share

(Source: NSE)

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