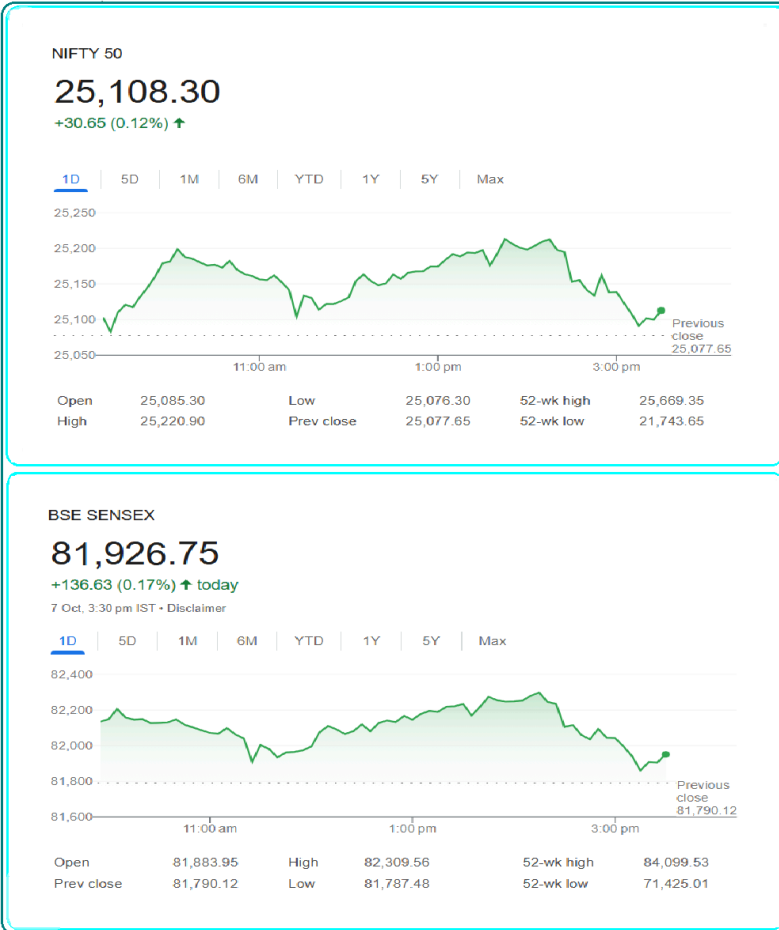


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25108.30	25077.65	0.12%
S&P BSE SENSEX	81926.75	81790.12	0.17%
NIFTY MID100	58289.40	58015.10	0.47%
NIFTY SML100	17983.40	17928.05	0.31%

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

Market Wrap Up

- The headline equity indices closed with small gains today, extending their winning streak for the fourth consecutive session. The rally was 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 market remained volatile amid the NSE's weekly F&O expiry. The Nifty closed above 25,100 level.
- The S&P BSE Sensex jumped 136.63 points or 0.17% to 81,926.75. The Nifty 50 index gained 30.65 points or 0.12% to 25,108.30.
- The S&P BSE Mid-Cap index gained 0.45% and the S&P BSE Small-Cap index shed 0.15%.
- Among the sectoral indices, the Nifty Realty index (up 1.09%), Nifty Oil & Gas index (up 0.49%) and the Nifty Pharma index (up 0.44%) outperformed the Nifty 50 index. Meanwhile, the Nifty FMCG index (down 0.53%), the Nifty Media index (down 0.46%) and the Nifty PSU Bank index (down 0.41%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **620** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **RELIANCE**, **BHARTIARTL**, **ICICIBANK**, **HDFCBANK**, **BAJFINANCE**.
- Short** position build up for the **November** series has been witnessed in **LT**, **SBIN**, **INFY**, **TRENT**.
- Unwinding** position for the **November** series has been witnessed in **HEROMOTOCO**, **BAJAJ-AUTO**, **NBCC**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56239.35	56104.85	0.24%
NIFTY AUTO	26933.55	26857.20	0.28%
NIFTY FMCG	54763.85	55057.65	-0.53%
NIFTY IT	34709.45	34722.50	-0.04%
NIFTY METAL	10156.65	10185.50	-0.28%
NIFTY PHARMA	21875.30	21779.85	0.44%
NIFTY REALTY	891.70	882.10	1.09%
BSE CG	69521.50	69564.12	-0.06%
BSE CD	58803.39	58638.03	0.28%
BSE Oil & GAS	27489.18	27360.42	0.47%
BSE POWER	6807.43	6798.94	0.12%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	47950.88	47944.76	0.01%
HANG SENG	CLOSED	26957.77	-
STRAITS TIMES	4472.26	4421.71	1.14%
SHANGHAI	CLOSED	CLOSED	-
KOSPI	CLOSED	CLOSED	-
JAKARTA	8169.28	8139.89	0.36%
TAIWAN	27211.95	26761.06	1.68%
KLSE COMPOSITE	1630.03	1638.09	-0.49%
ALL ORDINARIES	9253.60	9280.00	-0.28%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	98573.03	96871.84
NSE F&O	167005.84	152317.16

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1440.66
NET SELL	-

(Source: [NSE](#))

Corporate News

- **LTIMindtree** announced that it has secured a multi-year agreement with a leading global media and entertainment company, marking the company's largest strategic deal to date.
- **Dilip Buildcon** announced that its joint venture, DBL-APMPL (with Dilip Buildcon holding 74% and APMPL holding 26%), has received a letter of acceptance (LoA) from the Madhya Pradesh Jal Nigam (MPJNM).
- **Bank of India's** global business surged 11.80% YoY to Rs 15,61,888 crore Q2 FY26, up from Rs 13,97,100 crore in the same quarter last year. Global deposits stood at Rs 8,53,301 crore, reflecting a 10.08% YoY increase, while global gross advances rose 13.94% to Rs 7,08,587 crore in Q2 FY26, compared to Rs 6,21,919 crore in Q2 FY25.
- **Dabur India** faced temporary trade disruptions following the GST Council's September announcement of reduced rates. Consumers delayed purchases to benefit from lower MRPs. This led to a short-term moderation in sales for September and the second quarter of FY26. However, non-GST impacted brands performed well.
- **Brigade Enterprises** has entered into a joint development agreement (JDA) for a strategically located 6.6-acre land parcel in West Chennai with an estimated gross development value (GDV) of Rs 1,000 crore.
- **ZyduS Lifesciences** announced that it has received a Notice of Compliance (NOC) from Health Canada for its generic Liothyronine tablets in 5 mcg and 25 mcg strengths.
- **Biocon's** unit, in partnership with Carnegie Pharmaceuticals, has secured tentative approval from the USFDA for Rifaximin Tablets. This genetic anti-bacterial medication is used to reduce the risk of hepatic encephalopathy recurrence and treat irritable bowel syndrome with diarrhoea. The approval marks a significant step for the company in the pharmaceutical market.
- **AstraZeneca Pharma** has secured approval from India's drug regulator for its cancer treatment Trastuzumab Deruxtecan. This drug is now approved for adult patients with unresectable or metastatic HER2-positive solid

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BHARTIARTL	1929.00	1903.10	1.36%
BAJAJ-AUTO	8904.00	8792.00	1.27%
JIOFIN	309.90	306.25	1.19%
EICHERMOT	6957.00	6880.00	1.12%
HCLTECH	1433.40	1417.70	1.11%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
AXISBANK	1186.80	1212.80	-2.14%
TATAMOTORS	698.05	712.65	-2.05%
TATACONSUM	1120.00	1142.10	-1.94%
TRENT	4686.00	4777.30	-1.91%
ADANIET	2542.20	2573.50	-1.22%

(Source: [Moneycontrol](#))

- **Airtel** Business has secured a multi-year contract with the Indian Railway Security Operations Centre (IRSOC) to provide comprehensive security services for Indian Railways' digital infrastructure. This partnership aims to protect critical data, including passenger information and operational databases, from escalating cyber threats.
- **Paytm** announced the launch of Paytm AI Soundbox, India's first AI business device for small and medium businesses, helping them operate more efficiently and leverage the power of AI in their everyday operations.

tumours. It is the first and only antibody drug conjugate in India with a tumour-agnostic indication. This broadens its potential to help more patients with advanced HER2-positive cancers.

- **Tata Motors**-owned Jaguar Land Rover is resuming vehicle production starting October 8. The company faced a cyberattack in early September, halting operations for a month. JLR is also introducing a new financing plan to support its suppliers. This move aims to ensure a smooth return to manufacturing and strengthen business relationships.
- **Varmora Granito** promoters have bought back a 2% stake from private equity investor Carlyle Group. This move signals confidence ahead of the company's upcoming public offering. The promoters repurchased the stake for Rs 100 crore. Varmora Granito is preparing for a 100% book-built initial public offering. The company plans to use fresh issue proceeds to reduce debt.
- **Jio** led wireless subscriber additions in August, with BSNL surprisingly securing the second spot ahead of Bharti Airtel. Vodafone Idea continued to lose users, while Jio also dominated home broadband growth. High porting requests indicate intense competition in the Indian telecom market.
- **Oil India** said that it has signed a memorandum of understanding (MoU) with Mahanagar Gas (MGL) for exploring opportunities across the LNG value chain and in emerging clean energy areas.

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

Global News

- China's foreign exchange reserves rose by USD 16.5 billion, or 0.50%, to USD 3.339 trillion in September 2025, up from USD 3.322 trillion in August.
- Germany's factory orders fell 0.8% month-on-month in August 2025, missing market expectations for a 1.4% rise and following a downwardly revised 2.7% drop in the previous month.
- France's trade deficit narrowed to EUR 5.5 billion in August 2025 from a revised EUR 5.7 billion in July. Exports were stable at EUR 51.8 billion while the imports fell 0.4% to EUR 57.3 billion.
- France posted a current account surplus of EUR 1.5 billion in August 2025, shifting from a downwardly revised deficit of

EUR 1.9 billion in the previous month.

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

Economic News

- Crude Oil traded at US\$ 61.65/bbl (IST 17:00).
- INR strengthened to Rs. 88.78 from Rs. 88.79 against each US\$ resulting in daily change of 0.01%.
- The World Bank raised India's FY26 growth forecast to 6.5% from 6.3%, while trimming FY27 to 6.3%, citing higher US tariffs. Despite this, India remains the fastest-growing major economy, driven by strong consumption and GST reforms. South Asia's growth is projected to slow to 5.8% in 2026, though AI adoption could boost long-term productivity.
- India's housing market showed resilience in Q3 2025 with steady sales and broad price increases, driven by demand in higher-value segments. Premium housing, particularly units between Rs 1-2 crore, now dominates sales, indicating a structural shift in buyer preferences.
- India's government is in early talks with local insurers to design a nationwide climate-linked insurance program. This parametric model would provide quick, pre-determined payouts for extreme weather events like heatwaves and floods, helping the government manage disaster costs. India, highly vulnerable to climate change, aims to be a pioneer in this approach, building on successful state-level pilots.
- Worldwide solar and wind power generation has outpaced electricity demand this year, and for the first time on record, renewable energies combined generated more power than coal. Global solar generation grew by a record 31% in the first half of the year, while wind generation grew by 7.7%, according to the report by the energy think tank Ember, which was released after midnight Tuesday London time. Solar and wind generation combined grew by more than 400 terawatt hours, which was more than overall global demand increased in the same period, it found.

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

Forthcoming Events

Board Meetings as on 08/10/2025

Adani Enterprises Limited	Fund Raising
Madhya Bharat Agro Products Limited	Financial Results
Saatvik Green Energy Limited	Financial Results
Ugro Capital Limited	Fund Raising
Utkarsh Small Finance Bank Limited	Fund Raising

(Source: NSE)

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