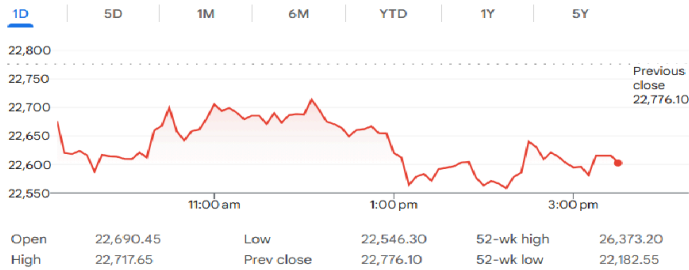


Index Chart

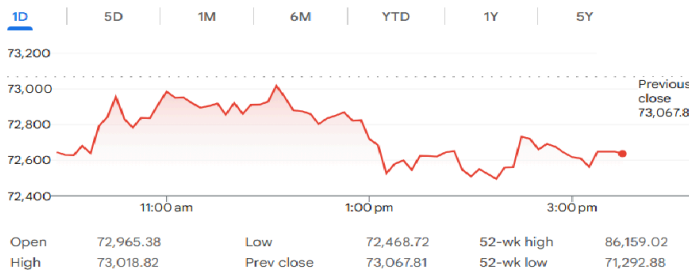
NIFTY 50

22,603.05 ↓ 0.76% -173.05



BSE SENSEX

72,638.70 ↓ 0.59% -429.11



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22603.05	22776.10	-0.76%
S&P BSE SENSEX	72638.70	73067.81	-0.59%
NIFTY MID100	59382.60	59761.20	-0.63%
NIFTY SML100	19506.95	19448.70	0.30%

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

Market Wrap Up

- The key equity indices ended with significant losses, snapping a two-session gaining streak, after the Reserve Bank of India (RBI) raised the repo rate by 25 basis points to 5.50% and shifted its monetary policy stance to 'calibrated tightening'. The Nifty closed below the 22,650 mark.
- The S&P BSE Sensex declined 429.11 points or 0.59% to 72,638.70. The Nifty 50 index fell 173.05 points or 0.76% to 22,603.05. In the past two consecutive sessions, the Sensex and Nifty have jumped 1.61% and 1.58%, respectively.
- The BSE 150 MidCap Index fell 0.64% and the BSE 250 SmallCap Index shed 0.02%.
- Among the sectoral indices, the Nifty PSU Bank index (up 1%), the Nifty Media Index (up 0.69%), the Nifty Private Bank index (up 0.08%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (down 2.33%), the Nifty Realty index (down 1.77%) and the Nifty Auto index (down 1.58%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **October** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **6454** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **BHARTIARTL**, **ICICIBANK**.
- Short** position build up for the **October** series has been witnessed in **SBIN**, **HDFCBANK**, **INFY**.
- Unwinding** position for the **October** series has been witnessed in **RELIANCE**, **WIPRO**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55055.55	55128.40	-0.13%
NIFTY AUTO	25138.90	25541.95	-1.58%
NIFTY FMCG	44800.85	45205.35	-0.89%
NIFTY IT	27757.80	28136.05	-1.34%
NIFTY METAL	12306.70	12599.75	-2.33%
NIFTY PHARMA	26436.55	26549.60	-0.43%
NIFTY REALTY	822.60	837.45	-1.77%
BSE CG	75226.90	75749.86	-0.69%
BSE CD	57542.36	58615.87	-1.83%
BSE Oil & GAS	24749.46	24935.16	-0.74%
BSE POWER	7193.71	7270.02	-1.05%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	70035.71	70683.98	-0.92%
HANG SENG	24130.50	24280.56	-0.62%
STRAITS TIMES	5608.44	5701.54	-1.63%
SHANGHAI	CLOSED	CLOSED	-
KOSPI	6803.90	6941.39	-1.98%
JAKARTA	6146.72	6192.93	-0.75%
TAIWAN	49806.37	49822.55	-0.03%
KLSE COMPOSITE	1611.78	1633.35	-1.32%
ALL ORDINARIES	8894.60	8903.50	-0.10%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	115268.89	109748.12
NSE F&O	122626.23	135398.93

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	6121.37

(Source: [NSE](#))

Corporate News

- Larsen & Toubro** announced that its subsidiary L&T Energy CarbonLite Solutions has secured a Limited Notice to Proceed (LNTP) from DVC CIL Power (DVCCIL) for the main plant package of the 2x800 MW Chandrapura thermal power plant in Jharkhand.
- Airtel** has launched new postpaid plans starting at Rs 499 that include one free international roaming trip per SIM every year, along with unlimited data and calling, safety features and bundled subscriptions. The five-day roaming pack offers 5GB data, 60 minutes of calls and 25 outgoing SMSes, and the new plans will be available from October 8.
- LTM** announced an expanded collaboration with Google Cloud to help accelerate adoption of Google Cloud's Gemini Enterprise. The collaboration will help organizations build, deploy, and scale AI-powered solutions by combining Gemini Enterprise capabilities with LTM's deep industry expertise, engineering talent, and global delivery capabilities.
- NTPC Ltd** plans to procure around 10 million tonnes from commercial mines in the next six months ending March amid depleting coal stocks at power plants.
- Adani Power** and Bhutan's state-owned Druk Green Power Corporation have signed an agreement to jointly develop the 770 MW Chamkharchhu-I Hydroelectric Project. The project will be built through a 49:51 equity partnership under the BOOT model, with construction expected to begin in the first half of 2027 and commissioning within six years.
- GAIL India** is in talks with three to four US LNG export projects to secure long-term supplies and may acquire a minority stake in one, industry executives said. The move comes after Strait of Hormuz disruptions exposed India's import vulnerabilities, with GAIL seeking to diversify its LNG sourcing.
- Tata Motors Passenger Vehicles** aims to ramp up production to 100,000 vehicles monthly from the next financial year. The company has been selling around 65,000 units monthly but faces supply constraints. Six new models are planned to enhance product offerings, aiming to meet robust demand. An investment of

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
KOTAKBANK	440.00	431.90	1.88%
BSE	3356.01	3305.00	1.54%
BHARTIARTL	1833.90	1810.50	1.29%
ICICIBANK	1357.50	1342.80	1.09%
COALINDIA	414.50	411.65	0.69%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TITAN	4377.00	4550.00	-3.80%
ADANIENT	2743.00	2849.90	-3.75%
HINDALCO	910.85	940.50	-3.15%
JSWSTEEL	1230.00	1259.60	-2.35%
BEL	378.30	387.40	-2.35%

(Source: [Moneycontrol](#))

- **Ramco Systems** has announced that its wholly owned subsidiary, Ramco Systems FZ-LLC, has partnered with Baker Tilly SM Envoy Consultancy LLC, one of the leading audit firms in the UAE, to make payroll easier for organisations across the country to adopt and manage.
- **Granules India** announced that it has submitted a Paragraph IV certification in connection with its ANDA for Ruxolitinib Extended-Release Tablets with respect to applicable patents listed in the U.S. Food and Drug Administration's (FDA) Orange Book and has provided the required notice to the relevant parties in accordance with applicable U.S. regulatory requirements.

₹37,500-40,000 crore is intended to boost market share significantly. Tata Motors expects a domestic market growth to 6.4 million units by FY31.

- **Tata Power** Solaroof has announced impressive growth in rooftop solar panel installations during the July to September quarter, registering 88,397 new setups - a notable 33 percent increase from last year. The first half of FY27 saw over 1,68,530 installations, achieving a 50 percent year-on-year growth. Uttar Pradesh took the spotlight with 1,16,254 installations, helping the company reach a cumulative total of 5,75,000 installations and a capacity exceeding 5.
- **SunBridge BioEnergy Ltd** has started commercial production of fuel-grade ethanol at its Seoni facility. This facility, with an investment of Rs 350 crore, has a daily production capacity of 300 kilolitres. The company also plans to increase its capacity by setting up another facility in Raipur, Chhattisgarh. SunBridge BioEnergy utilizes damaged food grains such as maize and broken rice for ethanol production.
- **NBCC** has launched 25 tenders worth Rs 9,620.33 crore to complete 16 stalled housing projects by Supertech. The National Company Law Appellate Tribunal appointed NBCC as the Project Management Consultant for these developments. Progress has been delayed since the appointment, pending necessary legal approvals. Approximately 50,000 housing units are affected, impacting thousands of homebuyers. Construction is slated to begin on January 16, 2027, after addressing outstanding issues.

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

Global News

- China's foreign exchange reserves fell to \$3.4 trillion at the end of September 2026, down \$38.1 billion from a month earlier.
- U.S. trade deficit widened to \$105.6 billion in August 2026 from a revised \$92.8 billion in July. Exports increased \$4.5 billion to \$315.2 billion in August 2026 while imports surged \$17.2 billion to an all-time high of \$420.8 billion in August 2026.
- Germany's industrial production rose 2.0% month-on-month in August 2026, rebounding from a revised 1.2% drop in

July. Compared with a year earlier, industrial production climbed 2.3%, recovering from a 1.8% fall in July.

- France's trade deficit narrowed to EUR 6.1 billion in August 2026 from a revised EUR 6.6 billion in July. Exports fell 0.8% month-on-month to EUR 54.2 billion while imports fell 1.5% to EUR 60.3 billion.
- France's current account deficit narrowed to a seasonally adjusted EUR 1.5 billion in August 2026 from a downwardly revised EUR 3.9 billion in the previous month.

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

Economic News

- Crude Oil traded at US\$ 89.86/bbl (IST 17:00).
- INR weakened to Rs. 96.78 from Rs. 96.43 against each US\$ resulting in daily change of 0.36%.
- The Reserve Bank of India (RBI) raised its key repo rate by 25 bps to 5.50%, marking the first hike since February 2023, at its October meeting.
- India's two-wheeler sales rose 33.08% year-on-year to 17.9 lakh units in September, the highest-ever September for the segment, while sales rose 4.41% from August. Rural and urban markets grew almost evenly, with sales rising 33.11% and 33.06%, respectively, from a year earlier. Electric vehicles accounted for 11.58% of September sales. EV retail across all vehicle categories touched an all-time high of about 3.34 lakh units, taking overall EV penetration to nearly 13%. Urban two-wheeler sales rose 5.29% from August, compared with 3.62% in rural markets, while 63% of dealers reported that booking pipelines were building. FADA said 75.57% of dealers expected October sales to grow as Navratri and Dussehra approached.
- India's foreign exchange reserves fell for a fourth consecutive week to \$734.6 billion as of October 2, 2026.
- The government has implemented a strategy to use e-way bill data to monitor subsidised fertiliser movement. Concerns over fertiliser supply due to the Iran war have prompted the Finance Ministry's analysis of trucking routes. Reports of route deviations and illegal unloading emphasize the significance of tracking fertiliser distribution. Increased enforcement has resulted in thousands of raids and notices against violators across India.
- Vehicle registrations across categories - a proxy for retail sales - rose 32% year-on-year to 2,536,920 units in September, albeit on a low base, supported by improved affordability among consumers since the GST reset last year. As per data collated by Federation of Automotive Dealers' Associations (FADA), passenger vehicles, two-wheelers and commercial vehicles retails rose 33%, 32% and 38%, respectively in the month under review.

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

Forthcoming Events

Board Meetings as on 08/10/2026

Tata Consultancy Services Limited	Financial Results/Dividend
GM Breweries Limited	Financial Results
Vedanta Limited	Dividend

(Source: NSE)

Corporate Actions as on 08/10/2026

Shankara Buildpro Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 2/- Per Share
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(Source: NSE)

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