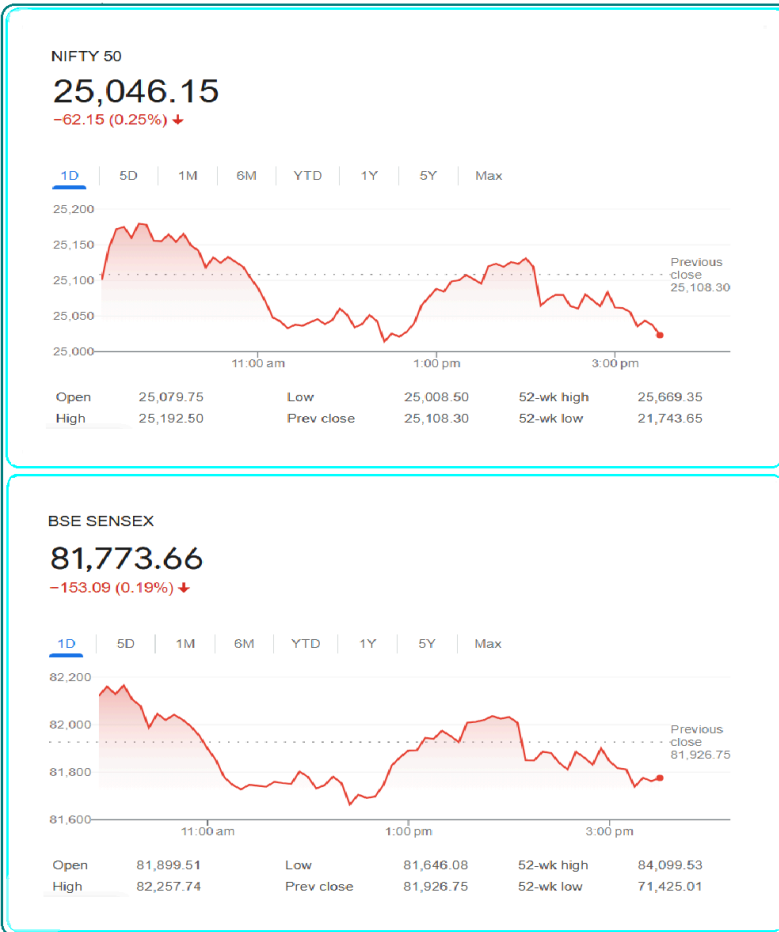


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	25046.15	25108.30	<b>-0.25%</b>
<b>S&amp;P BSE SENSEX</b>	81773.66	81926.75	<b>-0.19%</b>
<b>NIFTY MID100</b>	57866.75	58289.40	<b>-0.73%</b>
<b>NIFTY SML100</b>	17890.60	17983.40	<b>-0.52%</b>

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

## Market Wrap Up

- The headline equity indices closed with minor losses today, snapping their four-day winning streak. Investors remained cautious ahead of Q2 earnings season. Market participants also kept a close watch on quarterly business updates and ongoing IPO activity. The Nifty settled below 25,050 mark after hitting day's high of 25,192.50 in morning trade.
- The S&P BSE Sensex declined 153.09 points or 0.19% to 81,773.66. The Nifty 50 index fell 62.15 points or 0.25% to 25,046.15. In four consecutive trading sessions, the Sensex and Nifty jumped 2.07% and 2.02%, respectively.
- The S&P BSE Mid-Cap index declined 0.74% and the S&P BSE Small-Cap index shed 0.42%.
- Among the sectoral indices, the Nifty IT index (up 1.51%), and the Nifty Consumer Durables index (up 0.71%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Realty index (down 1.83%), the Nifty Media index (down 1.71%) and the Nifty Auto index (down 1.53%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **November** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **1821** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **BHARTIARTL, INFY, BAJFINANCE**.
- Short** position build up for the **November** series has been witnessed in **RELIANCE, SBIN, HDFCBANK**.
- Unwinding** position for the **November** series has been witnessed in **LT, ICICIBANK**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56018.25	56239.35	-0.39%
NIFTY AUTO	26522.40	26933.55	-1.53%
NIFTY FMCG	54489.65	54763.85	-0.50%
NIFTY IT	35232.20	34709.45	1.51%
NIFTY METAL	10136.55	10156.65	-0.20%
NIFTY PHARMA	21707.35	21875.30	-0.77%
NIFTY REALTY	875.40	891.70	-1.83%
BSE CG	68690.20	69521.50	-1.20%
BSE CD	59021.82	58803.39	0.37%
BSE Oil & GAS	27284.14	27489.18	-0.75%
BSE POWER	6706.30	6807.43	-1.49%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	47734.99	47950.88	-0.45%
HANG SENG	26829.46	26957.77	-0.48%
STRAITS TIMES	4456.30	4472.26	-0.36%
SHANGHAI	CLOSED	CLOSED	-
KOSPI	CLOSED	CLOSED	-
JAKARTA	8166.03	8169.28	-0.04%
TAIWAN	27063.68	27211.95	-0.54%
KLSE COMPOSITE	1627.50	1630.03	-0.16%
ALL ORDINARIES	9244.80	9253.60	-0.10%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	89602.56	98573.03
NSE F&O	144038.38	167005.84

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1440.66
NET SELL	-

(Source: [NSE](#))

## Corporate News

- Titan Company** rallied 4.55% to Rs 3,571.85 after its consumer businesses grew 20% year-on-year (YoY) in Q2 FY26. During the quarter, the company added 55 new stores, taking its total retail network to 3,377 stores, including 3,345 domestic stores.
- Godrej Consumer Products** has projected mid-single digit consolidated revenue growth for the quarter, despite short-term challenges arising from recent GST reforms. The government's GST rate reduction is seen as a positive step towards strengthening consumer demand. Nearly one-third of GCPL's portfolio-primarily toilet soaps along with smaller categories such as talcum powders, shampoos, and shaving creams-now benefits from a reduced GST rate of 5%, down from around 18%.
- Tata Motors** said that Jaguar Land Rover Automotive plc (JLR) has recorded wholesale volumes of 66,165 units in the second quarter of FY26, down 24.2% year-on-year (YoY) and down 24.2% compared to Q1 FY26. The overall mix of Range Rover, Range Rover Sport and Defender models was 76.7% of total wholesale volumes in Q2 FY26, down from 77.2% in the prior quarter and up from 67.0% YoY, reflecting the prioritisation of JLR's most profitable models.
- Tata Consultancy Services** has cancelled its planned press conference for Q2 FY26 earnings, scheduled for October 9. The company cited the date's coincidence with Ratan Tata's anniversary as the reason. While media briefings are dropped, the analyst call will proceed as usual, with market observers expecting no impact on investor sentiment.
- ABB** announced it has signed an agreement to divest its Robotics division to SoftBank Group Corp. for an enterprise value of \$5.375 billion and not pursue its earlier intention to spin-off the business as a separately listed company. The transaction is subject to regulatory approvals and further customary closing conditions and is expected to close in mid-to-late 2026.
- Bajaj Auto** has received a tax demand of over Rs 3.5 crore from Assam authorities for excess input tax credit availed in FY 21-22. The company plans to appeal the order, stating it fulfilled all GST law conditions. Bajaj Auto

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TITAN	3565.60	3418.20	4.31%
INFY	1496.00	1458.50	2.57%
TCS	3027.20	2973.70	1.80%
HCLTECH	1453.50	1433.40	1.40%
ETERNAL	342.55	337.85	1.39%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
TATAMOTORS	681.55	698.05	-2.36%
M&M	3432.10	3492.80	-1.74%
JIOFIN	304.65	309.90	-1.69%
BEL	404.00	410.30	-1.54%
ULTRACEMCO	12002.00	12184.00	-1.49%

(Source: [Moneycontrol](#))

- **IRB Infrastructure** reported an 11 percent increase in toll revenue for September 2025, reaching Rs 557 crore. This marks a rise from Rs 502 crore collected in September 2024. Key contributors included IRB MP Expressway, IRB Golconda Expressway, and IRB Ahmedabad Vadodara Super Express Tollway. Despite monsoon impacts, the company anticipates sustained growth driven by the upcoming festive season.
- **Jindal India** has commissioned a new downstream steel facility in West Bengal, costing Rs 1,500 crore and boasting a capacity of 0.6 million tonnes. This expansion will boost the company's existing annual capacity by 60%, significantly increasing its production of coated flat products, pipe products, and crash barriers.
- **Container Corporation of India** said that it has entered into a strategic agreement with UltraTech Cement to transport bulk cement using specialized tank containers.

expects no major financial impact from this demand.

- **Bajaj Finserv** has rebranded its insurance arms to Bajaj General Insurance and Bajaj Life Insurance, marking a significant shift after acquiring Allianz SE's stake for full ownership. This move signifies a renewed commitment to India's insurance sector, emphasizing trust and national growth. The company aims to empower Indians financially while upholding core values.
- **Tata Power-DDL** has partnered with Bihar State Power Holding Company Limited (BSPHCL) for a five-year training program aimed at developing engineers. This collaboration will facilitate the exchange of resources and infrastructure to implement initiatives focused on managerial and leadership development, strategic management, and innovation within the power distribution sector.
- Arunachal Pradesh cabinet approved the formation of Joint Venture Company **NHPC** Arunachal Green Energy Limited and NEEPCO Arunachal Hydro Power Corporation Limited.
- **Ajmera Realty** announced quarterly sales of Rs 720 crore for Q2 FY26, which is an increase of 184% as compared with the sales of Rs 254 crore recorded in Q2 FY25. The total sales volume for Q2 FY26 added up to 2,29,772 square feet, up by 101% from the volume of 1,14,046 square feet registered in for Q2 FY25.
- **Sai Life Sciences**, Agility Life Sciences, and Centrix Pharma Solutions today announced the launch of an Integrated CMC Partnership designed to provide innovator biopharma companies with end-to-end Chemistry, Manufacturing and Controls (CMC) services. The collaboration combines the extensive CMC expertise of Sai Life Sciences in API development, Agility Life Sciences in formulation development, and Centrix Pharma Solutions in drug product development and clinical manufacturing.

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

## Global News

- U.S. total consumer credit rose by \$0.36 billion in August 2025, sharply lower than the revised \$18.1 billion gain in July.
- Germany's industrial production fell by 4.3% month-over-month in August 2025, reversing a 1.3% increase in July. On an annual basis, total industrial output declined by 3.9%, reversing a 1.5% increase recorded in the previous year.
- Japan's current account surplus decreased to JPY 3,775.8 billion in August 2025, down from JPY 3,966.1 billion in the same month a year earlier.

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

## Economic News

- Crude Oil traded at US\$ 62.58/bbl (IST 17:00).
- INR weakened to Rs. 88.80 from Rs. 88.78 against each US\$ resulting in daily change of 0.02%.
- The Reserve Bank of India proposed changes to the way banks assign risk weightings to loans and implement the Expected Credit Loss (ECL) framework, in an effort to align domestic regulations with global standards.
- India and Brazil held their 7th Trade Monitoring Mechanism meeting, discussing bilateral trade and investment. The leaders aim to boost trade to \$20 billion in five years, with current merchandise trade at \$12.19 billion. Sectoral collaborations and market access were also key discussion points.
- An Indian firm, Bagadiya Brothers Pvt Ltd, has won a significant international rice import tender from Bangladesh. The company will supply 50,000 tonnes of rice. This marks the first such tender awarded directly by Bangladesh's interim government. More tenders are expected, benefiting Indian rice exporters, especially from West Bengal. This development boosts demand and prices for Indian rice varieties.
- India's Unified Payments Interface (UPI) has officially launched in Qatar, expanding beyond select airport duty-free shops to all retail outlets. This move significantly benefits the 830,000 Indian expatriates in Qatar, facilitating faster remittances and reduced transaction costs. The new payment option aims to connect the diaspora more closely with India.
- The Reserve Bank of India has linked its Bharat Connect bill payment system with the FX-Retail platform, allowing individual customers to purchase US dollars digitally. This initiative, initially available for customers of five major banks, enables transactions for currency notes, forex cards, and remittances through integrated banking and payment apps, aiming for competitive pricing and enhanced transparency.
- India's coal exports surged by 23.4% to 1.908 million tonnes in FY25, driven by growing global demand and government promotion. This increase aims to bolster energy security, achieve self-reliance, and stimulate economic growth by reducing imports and expanding exports to neighboring nations.

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

# Forthcoming Events

## Board Meetings as on 09/10/2025

Tata Consultancy Services Limited	Financial Results/Dividend
Tata Elxsi Limited	Financial Results
GM Breweries Limited	Financial Results
5Paisa Capital Limited	Financial Results
Eimco Elecon (India) Limited	Financial Results

(Source: NSE)

## Corporate Actions as on 09/10/2025

Chandrima Mercantiles Ltd	Bonus issue 1:2
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(Source: NSE)

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