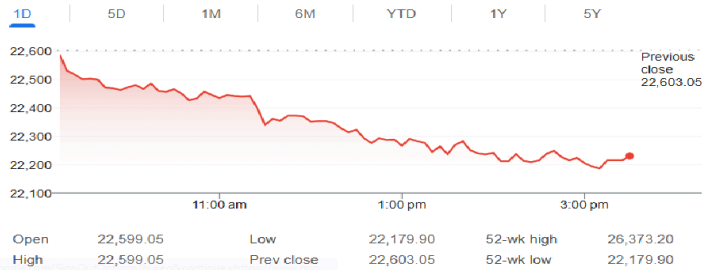


Index Chart

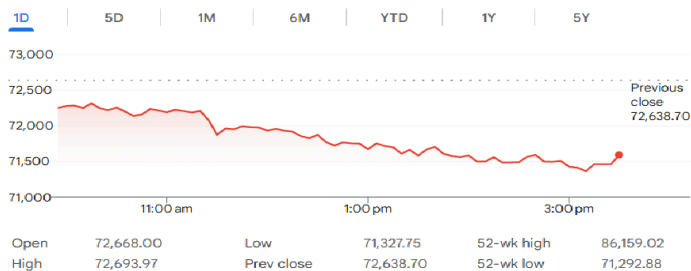
NIFTY 50

22,231.80 ↓ 1.64% -371.25



BSE SENSEX

71,593.24 ↓ 1.44% -1,045.46



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22231.80	22603.05	-1.64%
S&P BSE SENSEX	71593.24	72638.70	-1.44%
NIFTY MID100	57882.50	59382.60	-2.53%
NIFTY SML100	19050.10	19506.95	-2.34%

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

Market Wrap Up

- The key equity indices ended with major cuts, extending their decline for the second consecutive session, weighed down by weak global cues and caution following the Reserve Bank of India's (RBI) repo rate hike. Rising US Treasury yields and firm crude oil prices also continued to weigh on sentiment. The Nifty closed below the 22,250 mark.
- The S&P BSE Sensex tumbled 1,045.46 points or 1.44% to 71,593.24. The Nifty 50 index tanked 371.25 points or 1.64% to 22,231.80. In the two consecutive trading sessions, the Sensex declined 2.02%, while the Nifty 50 fell 2.39%. The BSE 150 MidCap Index dropped 2.48% and the BSE 250 SmallCap Index slipped 2.49%.
- Among the sectoral indices, the Nifty IT index (down 0.08%), the Nifty Private Bank Index (down 0.91%), the Nifty PSU Bank index (down 1.15%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (down 3.55%), the Nifty Realty index (down 3.16%) and the Nifty Media index (down 2.79%) 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 **6289** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **INFY, TCS, TECHM, TITAN**.
- Short** position build up for the **October** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.
- Unwinding** position for the **October** series has been witnessed in **ONGC, LTM, COFORGE**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54515.05	55055.55	-0.98%
NIFTY AUTO	24512.70	25138.90	-2.49%
NIFTY FMCG	43898.05	44800.85	-2.02%
NIFTY IT	27736.60	27757.80	-0.08%
NIFTY METAL	11870.05	12306.70	-3.55%
NIFTY PHARMA	25823.25	26436.55	-2.32%
NIFTY REALTY	796.60	822.60	-3.16%
BSE CG	72953.82	75226.90	-3.02%
BSE CD	56697.52	57542.36	-1.47%
BSE Oil & GAS	24100.96	24749.46	-2.62%
BSE POWER	6941.26	7193.71	-3.51%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	69042.11	70035.71	-1.42%
HANG SENG	23785.79	24130.50	-1.43%
STRAITS TIMES	5412.96	5608.44	-3.49%
SHANGHAI	3811.90	3842.19	-0.79%
KOSPI	6625.93	6803.90	-2.62%
JAKARTA	6031.28	6146.72	-1.88%
TAIWAN	49313.44	49806.37	-0.99%
KLSE COMPOSITE	1601.01	1611.78	-0.67%
ALL ORDINARIES	8823.20	8894.60	-0.80%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	117091.26	115268.89
NSE F&O	128178.70	122626.23

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	12943.58

(Source: [NSE](#))

Corporate News

- Tata Consultancy Services** reported a 4% sequential increase in consolidated net profit to Rs 13,884 crore for the second quarter of FY27, from Rs 13,349 crore in the preceding quarter. Excluding an exceptional loss related to a legal claim settlement in Q1, net profit rose marginally from Rs 13,849 crore. Consolidated revenue from operations rose 1.3% quarter-on-quarter to Rs 73,188 crore from Rs 72,275 crore.
- G M Breweries** reported a 12.61% year-on-year (YoY) and 4.11% quarter-on-quarter (QoQ) increase in consolidated profit after tax (PAT) to Rs 39.29 crore in Q2 FY27. Net sales, excluding VAT and excise duty, increased 18.28% YoY and 6.98% QoQ to Rs 213.52 crore during the quarter.
- PC Jeweller** reported approximately 28% YoY growth in consolidated revenue for the quarter ended 30th September 2026, supported by healthy demand. The company said it received remittances of approximately Rs 142 crore during Q2 FY27 from its outstanding export debtors.
- Senco Gold** reported 29% year-on-year growth in retail revenue in Q2 FY27, supported by festive demand and strong same-store sales growth. Total revenue, including corporate, e-commerce and exports, increased 31% year-on-year in Q2 FY27. Retail revenue grew 29%, while same-store sales growth (SSSG) stood at 19%.
- One 97 Communications** said that the Reserve Bank of India (RBI) disclosed that Paytm Payments Bank Limited (PPBL) had been excluded from the Second Schedule to the RBI Act, 1934.
- Adani Enterprises'** outlook is improving as several incubated businesses reach commercial scale. CARE Ratings upgraded AEL to AA, citing stronger financial flexibility after its Rs 15,000-crore QIP and Adani Airports monetisation. Airports, Kutch Copper and roads are expected to drive FY27 earnings, while data centres, new energy, defence and aluminium offer longer-term growth.
- Brigade Group** announced its plans to invest Rs 40,000 crore over the next three years. The investment will focus on housing, commercial, hospitality, and warehousing projects in South India. The group aims to develop a total of 40 million sq. ft. of various properties. Brigade has

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INFY	997.00	992.00	0.50%
TECHM	1496.20	1491.10	0.34%
AXISBANK	1245.00	1242.50	0.20%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ADANIENT	2596.00	2743.00	-5.36%
JSWSTEEL	1175.20	1230.00	-4.46%
ITC	255.00	265.70	-4.03%
MAXHEALTH	873.40	908.00	-3.81%
INDIGO	4813.10	4990.00	-3.55%

(Source: [Moneycontrol](#))

- **Railtel Corporation of India** has secured an order worth Rs 63.81 crore from Northern Coalfields for provision of primary MPLS VPN connectivity for implementation of ERP at NCLHQ, Projects/Units of NCL and DC& DRC on rental basis for 5 years.
- **EMS** has received the Letter of Award (LOA) for Sewerage Work in Jodhpur City under Amrut 2.0. The estimated order value (including GST but excluding O&M) is Rs. 129.80 crore.

previously developed over 110 million sq. ft. across more than 300 projects in ten cities.

- **Tata Power** and Ocean Sun have teamed up to introduce pioneering floating solar solutions at Mulshi reservoir. This pilot program will analyze both performance and scalability tailored to Indian circumstances, generating key insights into energy generation and maintenance relative to traditional methods.
- **Oil & Natural Gas Corpn** announced a joint venture company (JVC) with shareholding in the ratio of 50:25:25 by ONGC, Mangalore Refinery and Petrochemicals (MRPL) and ONGC Petro additions (OPaL). has been incorporated in the name of "ONGC Petrochemicals Marketing" (OPML) on 07 October 2026 as a public limited company, which shall undertake the business of integrated marketing and trading of petrochemicals, chemicals and kindred products.
- **Kabra Extrusion Technik** announced that GEON, its New Energy business division, has successfully executed and commissioned a 10 MW / 20 MWh Battery Energy Storage System (BESS) Project at Jaisalmer, Rajasthan, on EPC basis.
- **DEE Development Engineers** announced that its wholly owned subsidiary, DEE Fabricom India has received an order worth Rs 55 crore for supply of wind mill tower.

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

Global News

- U.S. consumer Credit decreased to \$8.28 Billion in August from \$17.74 Billion in July of 2026.
- Germany's trade surplus narrowed to EUR 19.5 billion in August 2026 from a revised two-and-a-half-year high of EUR 21.6 billion in July. Exports fell 0.8% month-on-month to EUR 137.6 billion while imports increased 0.9% to EUR 118.1 billion.
- Japan's current account surplus rose to JPY 4,062.0 billion in August 2026 from JPY 3,628.1 billion in the same month a year earlier.

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

Economic News

- Crude Oil traded at US\$ 92.67/bbl (IST 17:00).
- INR weakened to Rs. 96.79 from Rs. 96.78 against each US\$ resulting in daily change of 0.01%.
- India and Côte d'Ivoire discussed strengthening cooperation in defence and anti-terrorism, including training, capacity building and institutional exchanges, during External Affairs Minister S Jaishankar's visit to Abidjan.
- India and Oman held discussions on their bilateral relations during the 15th round of the Strategic Consultative Group. The meeting covered significant areas such as trade, investment, energy, and defence cooperation. Officials emphasized the importance of strengthening ties across multiple sectors and noted the progress made in their strategic partnership. Regional security issues, particularly relating to the Strait of Hormuz, were also addressed during the discussions.
- India, along with the United States and 13 other economies, has signed a joint statement aiming to address structural excess capacity. The participating economies emphasized the importance of eliminating non-market policies that distort economic conditions. They acknowledged the growing challenges posed by excess capacity in manufacturing sectors, which hinders market-based investments. The countries committed to cooperating and sharing information to mitigate the negative impacts on trade and jobs.
- The fitment committee under the Goods and Services Tax (GST) Council has decided that services provided by non-banking finance companies (NBFCs) to banks will be taxable at 18% GST, with their value determined in the manner prescribed by the Reserve Bank of India (RBI), people aware of the development said.
- Indian refiners have decreased their purchases of Russian crude oil for November delivery as prices rise. Competition from China is further driving up these prices, prompting a shift back to Middle Eastern oil sources. Imports from Russia have significantly fallen, with shipments dropping to their lowest level since March 2022. Indian refiners may find greater appeal in Middle Eastern oil due to the associated shipping efficiencies.
- India's diesel exports rose to a one-year high of about 620,000 barrels per day in September as record refining margins encouraged refiners to maximise production and overseas shipments. Europe absorbed nearly half the volumes at 280,000 bpd, up 80% from August, as refinery disruptions tightened regional diesel supplies.

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

Forthcoming Events

Board Meetings as on 09/10/2026

Anand Rathi Wealth Limited	Financial Results/Dividend
Can Fin Homes Limited	Financial Results
Canara HSBC Life Insurance Company Limited	Financial Results/Fund Raising
Canara Robeco Asset Management Company Limited	Financial Results/Dividend
Indbank Merchant Banking Services Limited	Financial Results
Poonawalla Fincorp Limited	Financial Results
Waterways Leisure Tourism Limited	Financial Results

(Source: NSE)

Corporate Actions as on 09/10/2026

Accelya Solutions India Limited	Dividend - Rs 35 Per Share
Mold-Tek Packaging Limited	Bonus 1:1
Mold-Tek Technologies Limited	Bonus 1:1
Skyways Air Services Limited	Interim Dividend - Re 0.25 Per Share
Transport Corporation of India Limited	Buy Back

(Source: NSE)

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