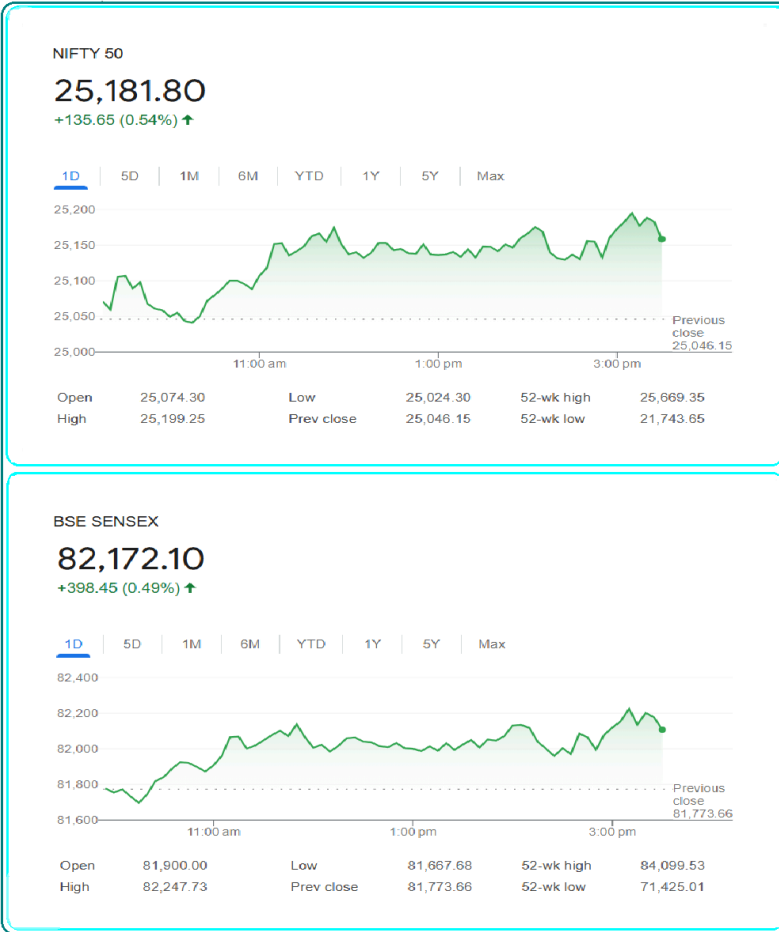


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25181.80	25046.15	0.54%
S&P BSE SENSEX	82172.10	81773.66	0.49%
NIFTY MID100	58429.85	57866.75	0.97%
NIFTY SML100	18000.25	17890.60	0.61%

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

Market Wrap Up

- The key equity benchmark ended with major gains today as optimism built ahead of TCS Q2 results. Market participants also kept a close watch on quarterly business updates and ongoing IPO activity. The Nifty settled above the 25,150 mark.
- The S&P BSE Sensex advanced 398.44 points or 0.49% to 82,172.10. The Nifty 50 index added 135.65 points or 0.54% to 25,181.80.
- The S&P BSE Mid-Cap index added 0.75% and the S&P BSE Small-Cap index rose 0.18%.
- Among the sectoral indices, the Nifty Metal index (up 2.17%), the Nifty IT index (up 1.12%) and the Nifty Healthcare index (up 1.07%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Consumer Durables index (up 0.04%), the Nifty Media index (up 0.10%) and the Nifty Auto index (up 0.24%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **1955** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK, INFY**.
- Short** position build up for the **November** series has been witnessed in **HDFCBANK, COLPAL, NAUKRI**.
- Unwinding** position for the **November** series has been witnessed in **LT, TATAMOTORS**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56192.05	56018.25	0.31%
NIFTY AUTO	26587.00	26522.40	0.24%
NIFTY FMCG	54707.45	54489.65	0.40%
NIFTY IT	35628.50	35232.20	1.12%
NIFTY METAL	10356.20	10136.55	2.17%
NIFTY PHARMA	21936.20	21707.35	1.05%
NIFTY REALTY	881.90	875.40	0.74%
BSE CG	69224.75	68690.20	0.78%
BSE CD	59158.46	59021.82	0.23%
BSE Oil & GAS	27399.74	27284.14	0.42%
BSE POWER	6748.71	6706.30	0.63%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	48580.44	47734.99	1.77%
HANG SENG	26752.59	26829.46	-0.29%
STRAITS TIMES	4440.50	4456.30	-0.35%
SHANGHAI	3933.97	3882.78	1.32%
KOSPI	3549.21	3549.21	-
JAKARTA	8250.94	8166.03	1.04%
TAIWAN	27301.92	27063.68	0.88%
KLSE COMPOSITE	1629.67	1627.50	0.13%
ALL ORDINARIES	9276.60	9244.80	0.34%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	92463.58	89602.56
NSE F&O	133348.03	144038.38

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1308.16
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Tata Consultancy Services** reported a 1.4% year-on-year rise in consolidated net profit to Rs 12,075 crore for the quarter ended September 30, 2025. Revenue for the quarter stood at Rs 65,799 crore, marking a 3.7% sequential rise and 0.8%. TCS declared a second interim dividend of Rs 11 per share, with October 15 as the record date and November 4 as the payment date.
- **Tata Elxsi Ltd.** reported 7.2% jump in net profit for the second quarter of fiscal 2026. The company's consolidated bottom-line for the quarter ended September rose to Rs 154.81 crore from Rs 144.4 crore in the previous quarter. The revenue rose 2.9% sequentially to Rs 918 crore from Rs 892 crore.
- **LG Electronics India's** profit surged 45.8% to Rs 2,203.35 crore in FY25, and its revenue from operations was up 14.1% to Rs 24,366.64 crore, according to the latest RoC filing by the appliances and consumer electronics major.
- **Larsen & Toubro's** hydrocarbon onshore business secured an 'ultra-mega' order, exceeding Rs 15,000 crore, for a Natural Gas Liquids plant in the Middle East. Partnering with CCC, L&T will lead engineering and procurement for processing Rich Associated Gas into valuable products, reinforcing its global energy infrastructure capabilities.
- **Tata Steel India** reported a seven percent increase in crude steel production to 5.67 million tonnes in the second quarter of the current fiscal, driven by the normalization of operations post-blast furnace relining. Domestic sales also saw a rise to 5.56 MT, supported by improved production and stable demand across market segments.
- **Mahindra** Group clarified that it has no plans to demerge its auto and tractor businesses, countering recent media reports. The company stated it values the synergies from keeping these units within the Mahindra & Mahindra entity, despite earlier speculation about separating tractors, passenger vehicles, and trucks into independent entities.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
JSWSTEEL	1176.50	1145.20	2.73%
TATASTEEL	176.42	171.94	2.61%
HCLTECH	1488.00	1453.20	2.39%
SBILIFE	1809.80	1772.90	2.08%
INDIGO	5741.50	5635.00	1.89%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
AXISBANK	1167.40	1180.60	-1.12%
TITAN	3550.60	3565.60	-0.42%
TATACONSUM	1118.00	1120.20	-0.20%
MARUTI	15985.00	16012.00	-0.17%
EICHERMOT	6891.50	6902.50	-0.16%

(Source: [Moneycontrol](#))

- Lupin** announced the launch of a strategic partnership program aimed at expanding the reach of PrecisionSphere™ – the long-acting injectable (LAI) platform developed by its subsidiary, Nanomi B.V. (Nanomi). PrecisionSphere™ demonstrates efficacy and safety in drug delivery and is ready for commercial use, following the recent United States Food and Drug Administration's (U.S. FDA) approval for the first product developed with this platform.
- G M Breweries** reported a 61% surge in standalone net profit of Rs 34.89 crore in Q2 FY26, compared to Rs 21.67 crore posted in Q2 FY25. Revenue from operations (excluding excise duty) increased 21.15% YoY to Rs 180.52 crore for the quarter ended 30 June 2025.
- Computer Age Management Services** announced that the company's payment Aggregator business (CAMSPAY) has launched - 'UPI Offline Plus' a cutting-edge solution designed to revolutionize offline UPI payments.
- Vascon Engineers** has received a redevelopment contract worth Rs 161.18 crore from MSEB Holding Company for the redevelopment of the 'Saudamini' Building located at Plot No.9, Haji Ali Park, Mahalaxmi, Mumbai.
- Info Edge (India)** said that it has recorded standalone billings of Rs 729 crore during quarter ended on 30 September 2025, which is higher by 12.1% as compared with billings value of Rs 650.3 crore posted in the same period last year. Providing business segment details, the company stated that Recruitment Solutions billings were Rs 545 crore (up 10.8% YoY), 99acres for Real estate billings were Rs 122.4 crore (up 14% YoY) and Other billings were Rs 61.6 crore (up 21% YoY) in Q2 FY26.
- Reliance Consumer Products Limited** has relaunched Veltette, a beloved personal-care brand from Tamil Nadu. The brand now offers updated soaps, shampoos, and lotions.
- Panacea Biotech** has secured a significant deal to supply bivalent oral polio vaccines valued at Rs 127.2 crore to the Central Medical Services Society. This crucial supply, confirmed via a Letter of Acceptance, will be delivered in multiple phases over 90 to 480 days, bolstering India's ongoing polio eradication efforts.
- Eicher Motors** said that VE Commercial Vehicles (VECV) would make an investment of Rs 544 crore for the production and final assembly of the Volvo Group's globally 12-speed automated manual transmission (AMT).

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

Global News

- Germany's trade surplus widened to EUR 17.2 billion in August 2025, up from an upwardly revised EUR 16.3 billion in July. Exports unexpectedly dropped 0.5% month-on-month to a seven-month low of EUR 129.7 billion while, imports shrank 1.3% to a three-month low of EUR 112.5 billion, following an upwardly revised 0.7% decline in July.
- Taiwan's foreign trade surplus rose to \$12.4 billion in September from \$7.1 billion in the corresponding month last year. Exports surged 33.8% year-over-year in September, and imports climbed by 25.1%.

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

Economic News

- Crude Oil traded at US\$ 62.26/bbl (IST 17:00).
- INR strengthened to Rs. 88.79 from Rs. 88.80 against each US\$ resulting in daily change of 0.01%.
- India and the United Kingdom announced the signing of the Terms of Reference to reposition the Joint Economic and Trade Committee (JETCO).
- India's manufacturing sector is set for sustained growth in FY2025-26, driven by strong domestic demand, investment optimism, and recent GST cuts, according to FICCI's Q2 survey. About 87% of firms reported stable or higher production, with 83% expecting increased orders.
- The statistics ministry met with fintech firms to boost the national statistical system. Discussions focused on data accessibility and filling information gaps. Secretary Saurabh Garg spoke about data as a public good, proposing a three-tier access framework for open, registered, and restricted data. The government is also working to democratize AI resources for all citizens.
- The Reserve Bank of India has launched a retail sandbox for its central bank digital currency (CBDC), enabling fintech firms to develop and test solutions for the ongoing pilot. This initiative follows the commencement of the e-rupee pilot on December 1, 2022, which has already garnered approximately 7 million users in India.
- Indian state refiners have extended their first joint tender for U.S. LPG imports to October 17, seeking about 2 million metric tons for delivery in 2026. This move aims to boost energy imports from the U.S., diversify India's fuel sources away from the Middle East, and potentially aid trade relations.

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

Forthcoming Events

Board Meetings as on 10/10/2025

Elecon Engineering Company Limited	Financial Results/Dividend
GK Energy Limited	Financial Results
Indosolar Limited	Financial Results
IndiGrid Infrastructure Trust	Fund Raising
Affordable Robotic & Automation Limited	Financial Results
Computer Age Management Services Limited	Stock Split
Intense Technologies Limited	Financial Results
Le Travenues Technology Limited	Fund Raising
Waaree Renewable Technologies Limited	Financial Results

(Source: NSE)

Corporate Actions as on 10/10/2025

Hexaware Technologies Limited	Interim Dividend - Rs 5.75 Per Share
Rashtriya Chemicals and Fertilizers Limited	Dividend - Rs 1.32 Per Share
Ujaas Energy Limited	Bonus 2:1
Capital Trust Limited	Rights 1:1 @ Premium Rs 4/-

(Source: NSE)

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