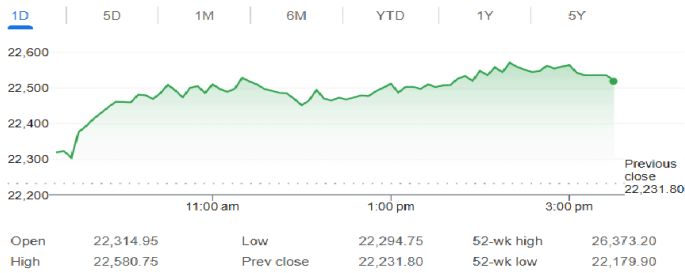


Index Chart

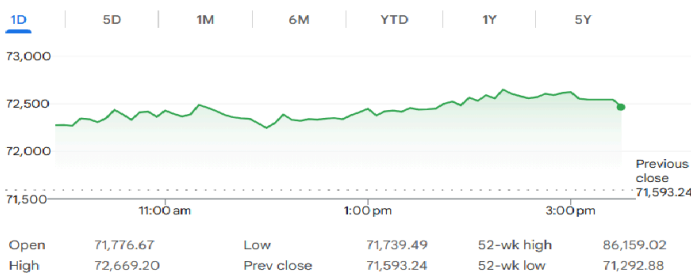
NIFTY 50

22,520.45 ↑ 1.30% +288.65



BSE SENSEX

72,472.33 ↑ 1.23% +879.09



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22520.45	22231.80	1.30%
S&P BSE SENSEX	72472.33	71593.24	1.23%
NIFTY MID100	58787.30	57882.50	1.56%
NIFTY SML100	19153.70	19050.10	0.54%

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

Market Wrap Up

- The key equity indices ended with a major gains, snapping a two-session losing streak, as easing crude oil prices and improved global sentiment lifted investor appetite following Thursday's sharp selloff. Sentiment also received a boost from strong buying in IT stocks after Tata Consultancy Services reported its Q2 FY27 results. The Nifty closed above the 22,500 level.
- The S&P BSE Sensex jumped 879.09 points or 1.23% to 72,472.33. The Nifty 50 index added 288.65 points or 1.30% to 22,520.45.
- The Nifty MidCap 150 Index jumped 1.37% and the Nifty SmallCap 250 Index rose 0.49%.
- Among the sectoral indices, the Nifty IT index (up 3.02%), the Nifty FMCG Index (up 2.20%), the Nifty PSU Bank index (up 1.63%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Pharma index (up 0.54%), the Nifty Realty index (up 0.92%) and the Nifty Consumer Durables index (up 1%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **October** series futures witnessed an **unwinding** of position. Open Interest has been decreased by **1115** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.
- Short** position build up for the **October** series has been witnessed in **RELIANCE, ENRIN, POWERINDIA**.
- Unwinding** position for the **October** series has been witnessed in **BRITANNIA, TMPV, OIL**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55256.65	54515.05	1.36%
NIFTY AUTO	24859.90	24512.70	1.42%
NIFTY FMCG	44864.25	43898.05	2.20%
NIFTY IT	28574.90	27736.60	3.02%
NIFTY METAL	12000.75	11870.05	1.10%
NIFTY PHARMA	25962.05	25823.25	0.54%
NIFTY REALTY	803.95	796.60	0.92%
BSE CG	73291.70	72953.82	0.46%
BSE CD	57153.29	56697.52	0.80%
BSE Oil & GAS	24157.89	24100.96	0.24%
BSE POWER	6986.28	6941.26	0.65%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	69030.92	69042.11	-0.02%
HANG SENG	24211.35	23785.79	1.79%
STRAITS TIMES	5401.89	5412.96	-0.20%
SHANGHAI	3813.79	3811.90	0.05%
KOSPI	CLOSED	6625.93	-
JAKARTA	6093.76	6031.28	1.04%
TAIWAN	CLOSED	49313.44	-
KLSE COMPOSITE	1608.45	1601.01	0.46%
ALL ORDINARIES	8877.70	8823.20	0.62%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	100417.24	117091.26
NSE F&O	138017.76	128178.70

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	3568.90

(Source: [NSE](#))

Corporate News

- **KEC International** secured new orders worth Rs 1,030 crore across its various businesses. The transmission and distribution (T&D) business secured orders for a 400 kV transmission line in Bhutan, an additional order for a 380 kV transmission line in Saudi Arabia, and the supply of towers, hardware and poles in the Americas.
- **Pace Digitex** received a letter of intent (LoI) from BSES Rajdhani Power (BRPL) for developing a 57.5 MW/115 MWh standalone battery energy storage system (BESS) in Delhi.
- **NCC** secured a road construction order worth Rs 1,286.03 crore from Hyderabad Growth Corridor.
- **Ola Electric Mobility** announced a rights issue of up to 37.03 crore partly paid-up equity shares.
- **Dr Reddy's Laboratories** has received a Form 483 with two observations from the US Food and Drug Administration (USFDA) following an inspection at its manufacturing facility in Pydibhimavaram, Andhra Pradesh.
- **Swastika Infra Ltd** has received a significant order worth over Rs 600 crore from MSEDCL. This order focuses on developing distribution infrastructure and strengthening existing systems in Maharashtra. The scope of work includes constructing substations, HT/LT lines, and distribution transformers. Completion of the project is scheduled for 24 months from the date of the award. This initiative reflects the company's commitment to improving electrical distribution networks in the region.
- **Subex** announced a three-year engagement with a leading African mobile operator for the deployment of Subex HyperSense Fraud Management solution. The engagement strengthens Subex's presence in Africa and extends its fraud management capabilities to another operating company within a major global telecommunications group.
- **Brahmaputra Infrastructure** received a Letter of Acceptance (LoA) through its joint venture with Ganesh Kartikey for the construction of a high-level major bridge over the Ravi River in Punjab, worth Rs 89.73.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
APOLLOHOSP	8027.50	7666.00	4.72%
ITC	266.00	255.00	4.31%
EICHERMOT	7050.00	6767.50	4.17%
TCS	2156.00	2076.00	3.85%
HCLTECH	1216.70	1176.90	3.38%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
BSE	3287.20	3334.80	-1.43%
RELIANCE	1170.30	1178.00	-0.65%
JSWSTEEL	1168.00	1175.20	-0.61%
CIPLA	1301.00	1306.80	-0.44%

(Source: [Moneycontrol](#))

- **Zetwerk** is said to plan up to \$525 million India IPO next week. Zetwerk operates 26 manufacturing sites across India, the US, Spain and Germany. The company manufactures products for industries including utilities, renewable energy, consumer electronics and artificial-intelligence infrastructure.
- Verinvest-backed **Veeba Foods** kicks off pre-IPO fundraise, targets over Rs 8,000 crore valuation. Axis, Jefferies, Motilal Oswal, and 360 One are advisors.
- **Prozeal Green Energy** has completed a framework agreement for a solar project in Gujarat. Valued at around Rs 460 crore, this 100-megawatt project awaits essential approvals before activation. Anticipated to launch by 2027, it is set to tackle the growing energy needs as Prozeal Green Energy emphasises its dedication to renewable energy innovations in the commercial industry.

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

Global News

- U.S. initial jobless claims edged down to 197,000 in the week ended October 3rd, a decrease of 2,000 from the previous week's revised level of 199,000. Continuing claims rose by 17,000 to 1,716,000, remaining relatively close to the more-than-three-year low touched in the previous week.
- U.S. wholesale inventories rose 0.5% month-on-month to \$964.2 billion in August 2026, following an upwardly revised 1.4% increase in July.

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

Economic News

- Crude Oil traded at US\$ 91.47/bbl (IST 17:00).
- INR strengthened to Rs. 96.74 from Rs. 96.79 against each US\$ resulting in daily change of 0.05%.
- The 57th GST Council meeting has introduced measures to simplify compliance and expedite refunds for businesses. Recommendations include increasing the prosecution threshold and reducing penalties for non-compliance. The proposed framework features faster acknowledgement timelines for claims and provisional refunds for taxpayers. Changes to the inverted-duty structure are set to unlock credits in various sectors including textiles and manufacturing.
- Farmers in the Midwest United States face surging diesel and fertiliser costs which are outpacing their incomes. The sector has seen diesel prices climb by 67 percent while fertiliser prices, at times, have seen steep price jumps. This comes amid trade along the Strait of Hormuz being disrupted by the US' conflict with Iran. Trade wars with China and Canada has also worsened the US agricultural market, raising doubts over their continued support for the Republican Party.
- The GST Council has recommended allowing employers to claim input tax credit on GST paid for health and life insurance policies taken for employees. The move could reduce the effective cost of employer-sponsored coverage, particularly benefiting small businesses, while making group health insurance more affordable and improving employee benefits.
- Indian customs authorities have held about 1,500 tonnes of soybean cargoes at JNPT after importers failed to provide documents proving the shipments originated in Niger and qualified for duty-free entry. The scrutiny follows a sharp surge in soybean imports declared as coming from Niger and concerns that Nigerian beans may have been mis-declared to avoid import duties.
- The Reserve Bank of India's first major attempt to drain surplus liquidity and improve transmission of its rate hike met with a muted response. Banks parked just Rs 79,655 crore in the central bank's 29-day variable rate reverse repo (VRRR) auction, less than half of the Rs 2 lakh crore absorption plan.
- The USDA has slashed its expectations for Indian sugar production in the 2026/27 season to 29.5 million metric tons due to a forecasted rainfall shortfall. This predicted deficit is set to impact sugarcane's sucrose level and decrease the area available for effective harvesting. Moreover, looming drought conditions are likely to disrupt milling operations by early 2027.
- Daily coal supplies to the power sector have increased by around 36% from the September low. Stock depletion has slowed sharply, falling from 0.243 MT per day in September to 0.116 MT in October. Rail loading has strengthened, with averages exceeding 465 rakes daily in October. The Coal Ministry clarified that critical stock levels are early-warning signs, not immediate risks of shortages.

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

Forthcoming Events

Board Meetings as on 10/10/2026

Avenue Supermarts Limited	Financial Results
Premier Polyfilm Limited	Financial Results

Board Meetings as on 12/10/2026

HCL Technologies Limited	Financial Results/Dividend
RBL Bank Limited	Financial Results
Swaraj Engines Limited	Financial Results
ICICI Prudential Asset Management Co Ltd	Financial Results/Dividend
Gujarat State Fertilizers & Chemicals Ltd	Financial Results
Adroit Industries (India) Limited	Financial Results
Alkali Metals Limited	Financial Results
Hindustan Composites Limited	Dividend
Plastiblends India Limited	Financial Results

(Source: NSE)

Corporate Actions as on 12/10/2026

JOJO Ltd	Bonus issue 1:1
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(Source: NSE)

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