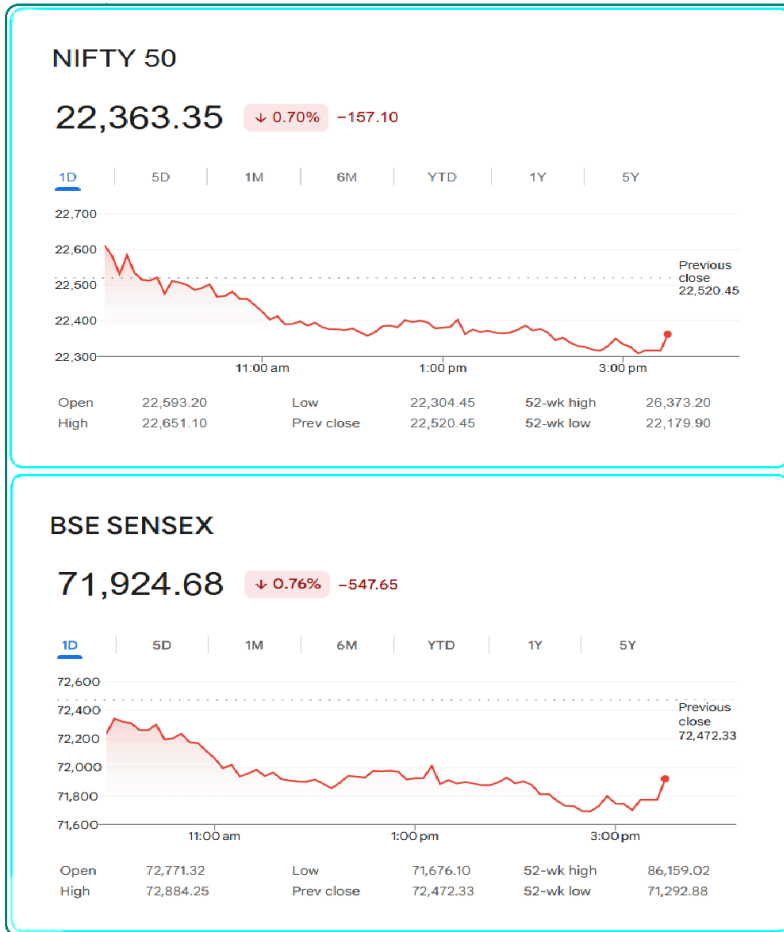


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22363.35	22520.45	-0.70%
S&P BSE SENSEX	71924.68	72472.33	-0.76%
NIFTY MID100	58834.55	58787.30	0.08%
NIFTY SML100	19425.80	19153.70	1.42%

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

Market Wrap Up

- The key equity benchmarks ended with modest cuts as investor sentiment remained cautious ahead of the release of India's inflation data later in the day. Although crude oil prices retreated, they remained above \$105 a barrel, keeping inflationary concerns in focus. A sharp rise in Indian bond yields further weighed on market sentiment. The Nifty settled below the 22,400 level.
- The S&P BSE Sensex declined 547.65 points or 0.76% to 71,924.68. The Nifty 50 index dropped 157.10 points or 0.70% to 22,363.35.
- The BSE 150 MidCap Index added 0.13% and the BSE 250 SmallCap Index jumped 1.08%.
- Among the sectoral indices, the Nifty Media index (up 4.60%), the Nifty Auto index (up 0.90%) and the Nifty Realty index (up 0.76%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty FMCG index (down 1.67%), the Nifty PSU Bank index (down 1.18%) and the Nifty IT index (down 0.79%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **October** series futures witnessed a fresh **short** of position build up. Open Interest has been increased by **1340** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **BHEL, HCLTECH**.
- Short** position build up for the **October** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.
- Unwinding** position for the **October** series has been witnessed in **HEROMOTOCO, BAJAJ-AUTO, TRENT, WIPRO**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54918.00	55256.65	-0.61%
NIFTY AUTO	25084.40	24859.90	0.90%
NIFTY FMCG	44113.40	44864.25	-1.67%
NIFTY IT	28349.60	28574.90	-0.79%
NIFTY METAL	11951.15	12000.75	-0.41%
NIFTY PHARMA	26078.85	25962.05	0.45%
NIFTY REALTY	810.05	803.95	0.76%
BSE CG	74254.37	73291.70	1.31%
BSE CD	57113.34	57153.29	-0.07%
BSE Oil & GAS	24077.15	24157.89	-0.33%
BSE POWER	7024.28	6986.28	0.54%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	CLOSED	69030.92	-
HANG SENG	24271.20	24211.35	0.25%
STRAITS TIMES	5415.48	5401.89	0.25%
SHANGHAI	3797.24	3813.79	-0.43%
KOSPI	6384.24	6625.93	-3.65%
JAKARTA	5936.15	6093.76	-2.59%
TAIWAN	49301.96	49313.44	-0.02%
KLSE COMPOSITE	1618.01	1608.45	0.59%
ALL ORDINARIES	8937.00	8877.70	0.67%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	96863.11	100417.24
NSE F&O	133294.25	138017.76

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1708.48

(Source: [NSE](#))

Corporate News

- Avenue Supermarts** reported a 7.64% YoY increase and a 14.12% QoQ decline in standalone profit after tax to Rs 803.60 crore in Q2 FY27. Revenue from operations rose 18.42% YoY and 4.70% QoQ to Rs 19,206.18 crore, compared with Rs 16,218.79 crore in Q2 FY26 and Rs 18,343.49 crore in Q1 FY27.
- KEC International** has secured new orders worth Rs 1,014 crore in its India transmission and distribution (T&D) business.
- Lumino Industries** announced new orders worth Rs 496 crore secured since its listing on 3 September 2026. These include orders worth Rs 339 crore for supply of conductors and cables and EPC orders worth Rs 157 crore for underground distribution network upgrades.
- Suzlon Group** plans to invest Rs 550 crore in three new AI-powered blade factories across India. These facilities will enhance production capabilities and meet rising domestic wind industry demands. Two factories will be located in Gujarat and Karnataka, while the third will be in Tamil Nadu.
- Tata Motors Ltd** has raised its takeover offer for Iveco Group NV by 0.30 euro per share. The revised price now stands at 14.40 euro per share, after initial delays in the authorization process. Shares will be tendered in a voluntary offer occurring from September to October 2026. The company has stated that this revised offer will not be increased further.
- Puravankara** has entered into a Joint Development Agreement (JDA) for a 12.76-acre land parcel in Sathanur, North Bengaluru, with an estimated Gross Development Value (GDV) of Rs 2,500 crore.
- Tata Power Renewable Energy**, a subsidiary of The **Tata Power Company** (Tata Power), delivered a strong execution performance in Q2 FY27, commissioning 419 MW of utility-scale projects representing over 130% year-on-year growth compared to the 182 MW of utility-scale capacity executed during the corresponding quarter of the previous fiscal year. It has also executed 131.2 MWhr of storage projects (101.2 MWhr of storage capacity for in-house TPREL, while the remaining 30 MWhr of storage capacity comprised third-party projects)

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
DRREDDY	1229.40	1197.00	2.71%
BAJAJ-AUTO	10034.00	9778.00	2.62%
TMPV	284.45	279.90	1.63%
BEL	373.90	368.15	1.56%
BSE	3330.20	3287.20	1.31%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
APOLLOHOSP	7775.00	8027.50	-3.15%
ITC	257.90	266.00	-3.05%
TECHM	1471.00	1514.10	-2.85%
LT	3627.50	3703.30	-2.05%
MAXHEALTH	865.95	883.80	-2.02%

(Source: [Moneycontrol](#))

- **Mastek** and CORT Business Services, a Berkshire Hathaway company, have won the 2026 ISG Paragon Partnership of the Year award for North America, recognizing their decade-long partnership and continued evolution in digital and business transformation.
- **Tech Mahindra** said that SpaceX's expansion plans raised concerns over increased competition in the wireless communications market.
- **Saatvik Green Energy** said that it has received an order worth approximately Rs 100 crore from Maharashtra State Electricity Distribution Company (MSEDCL) for 5,000 solar photovoltaic water pumping systems.

during Q2FY27.

- **Kutch Copper Ltd**, a part of **Adani Enterprises**, plans to integrate 115 megawatts of renewable energy into operations. The copper refinery in Mundra aims to expand from 500,000 tonnes to 1 million tonnes per annum. This expansion would make it the world's largest single-location custom smelter. Kutch Copper is committed to environmental stewardship by treating nearly all sulphur emissions and conserving water resources. The Adani Group has pledged USD 1.
- **Siyaram Recycling Industries** secured an order worth Rs 2.02 crore from Green Metals FZCO, Dubai, United Arab Emirates, for brass billets.
- **Raymond** through its subsidiary companies is accelerating its capacity expansion in Andhra Pradesh to support strong business momentum and growing customer requirements.
- **Bajel Projects** secured a major EPC order worth over Rs 200 crore for 220kV Gas Insulated Switchgear (GIS) substations at Salsette and Powai in Mumbai.
- **Rajesh Power Services** secured turnkey contracts worth Rs 471.92 crore, inclusive of taxes, from Madhya Gujarat Vij Company Limited (MGVCL).
- **Ajmera Realty & Infra India** declined 69% to Rs 224 crore in Q2 FY27, compared with Rs 720 crore in Q2 FY26. Collections fell 14% to Rs 190 crore during the quarter from Rs 220 crore in the corresponding quarter last year, while carpet area sold declined 68% to 72,883 square feet from 2,29,772 square feet.

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

Global News

- U.S. University of Michigan's consumer sentiment index fell to 46.3 in early October 2026.

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

Economic News

- Crude Oil traded at US\$ 92.93/bbl (IST 17:00).
- INR strengthened to Rs. 95.79 from Rs. 96.74 against each US\$ resulting in daily change of 0.98%.
- India's inflation rate rose to 5.54% in September 2026 from 4.83% in the previous month. Month-on-month, the Indian CPI rose by 0.69%.
- India is experiencing agricultural risks attributed to monsoon conditions, which could impact food processors and poultry producers. Procurement costs and inventory needs are likely to rise significantly due to these agricultural challenges. Rice and wheat stocks provide immediate buffers against potential food-supply issues, but maize faces direct risks from production shortfalls. Affected states include Madhya Pradesh and Rajasthan, which contribute significantly to overall foodgrain output.
- The Indian government is set to enhance GST reporting for imported services through e-invoicing. This expansion will affect businesses with an annual turnover exceeding Rs 5 crore. Companies will need to modify their documentation processes to comply with the new regulations. Proposed changes aim to reduce mismatches between tax liabilities and input tax credits. The consultation on these changes is expected to begin shortly, with implementation likely in April 2027.
- India's services sector is expected to maintain a positive demand outlook in Q3FY27, although business optimism has moderated compared with the previous quarter, with firms anticipating some easing in cost pressures but remaining less optimistic about selling prices and profit margins, according to the Reserve Bank of India's (RBI) latest Services and Infrastructure Outlook Survey.
- India's power transmission network is expanding, which is expected to create growth opportunities within the engineering sector. The integration of renewable energy and demand from data centres will drive the need for advanced power equipment. High-Voltage Direct Current (HVDC) technology will play a crucial role in this expansion. However, risks such as project delays and higher input costs could impact revenue growth.

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

Forthcoming Events

Board Meetings as on 13/10/2026

Hero Motors Limited	Financial Results
ICICI Prudential Life Insurance Company Limited	Financial Results
Tata Elxsi Limited	Financial Results
Anand Rathi Share and Stock Brokers Limited	Financial Results
Transformers And Rectifiers (India) Limited	Financial Results
TRF Limited	Financial Results
Den Networks Limited	Financial Results
Eimco Elecon (India) Limited	Financial Results
GTPL Hathway Limited	Financial Results
PNB Gilts Limited	Financial Results
Sejal Glass Limited	Financial Results
SS Retail Limited	Financial Results
Talwalkars Better Value Fitness Limited	Financial Results
The State Trading Corporation of India Limited	Financial Results

(Source: NSE)

Corporate Actions as on 13/10/2026

Ola Electric Mobility Limited	Rights 2:25 @ Premium Rs 17/-
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(Source: NSE)

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