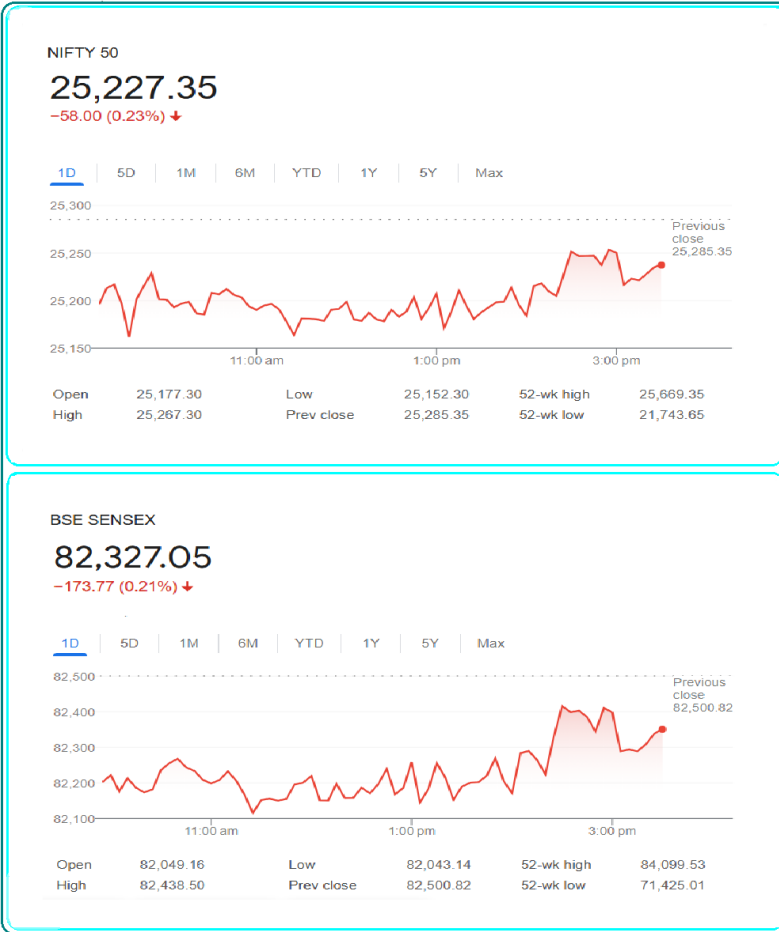


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25227.35	25285.35	-0.23%
S&P BSE SENSEX	82327.05	82500.82	-0.21%
NIFTY MID100	58762.35	58697.40	0.11%
NIFTY SML100	18101.75	18133.35	-0.17%

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

Market Wrap Up

- The domestic equity benchmarks ended with minor losses today, breaking a two-day winning streak, weighed down by renewed trade tensions between the U.S. and China that dampened investor risk appetite. The selloff was triggered by U.S. President Donald Trump's escalation of tariff threats following Beijing's tightening of restrictions on rare earth exports. However, Q2 earnings, key economic data, and global cues are expected to guide market direction. The Nifty settled below the 25,250 mark. The S&P BSE Sensex declined 173.77 points or 0.21% to 82,327.05. The Nifty 50 index fell 58 points or 0.23% to 25,227.35. In the past two trading sessions, the Sensex and Nifty jumped 0.89% and 0.96%, respectively. The S&P BSE Mid-Cap index shed 0.18% and the S&P BSE Small-Cap index fell 0.43%.
- Among the sectoral indices, the Nifty PSU Bank index (up 0.24%), the Nifty Media index (up 0.11%) and the Nifty Private Bank index (up 0.10%) outperformed the Nifty 50 index. Meanwhile, the Nifty FMCG index (down 0.90%), the Nifty Consumer Durables index (down 0.84%) and the Nifty IT index (up 0.78%) 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 **286** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **BHARTIARTL, BAJFINANCE, LTIM**.
- Short** position build up for the **November** series has been witnessed in **RELIANCE, ICICIBANK, HDFCBANK, INFY**.
- Unwinding** position for the **November** series has been witnessed in **LT, SBIN**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56625.00	56609.75	0.03%
NIFTY AUTO	26698.15	26721.20	-0.09%
NIFTY FMCG	54473.85	54966.45	-0.90%
NIFTY IT	35330.80	35609.05	-0.78%
NIFTY METAL	10217.45	10261.55	-0.43%
NIFTY PHARMA	22205.10	22218.25	-0.06%
NIFTY REALTY	896.80	896.65	0.02%
BSE CG	68963.20	69552.59	-0.85%
BSE CD	59206.35	59578.37	-0.62%
BSE Oil & GAS	27311.09	27363.00	-0.19%
BSE POWER	6796.75	6796.13	0.01%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	CLOSED	48088.80	-
HANG SENG	25889.48	26290.32	-1.52%
STRAITS TIMES	4389.84	4427.06	-0.84%
SHANGHAI	3889.50	3897.03	-0.19%
KOSPI	3584.55	3610.60	-0.72%
JAKARTA	8227.20	8257.86	-0.37%
TAIWAN	26923.42	27301.92	-1.39%
KLSE COMPOSITE	1615.19	1622.25	-0.44%
ALL ORDINARIES	9183.30	9264.30	-0.87%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	91723.49	94005.11
NSE F&O	145434.75	155219.83

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	240.10

(Source: [NSE](#))

Corporate News

- Avenue Supermarts Ltd** reported a 3.85% rise in consolidated net profit to Rs 684.85 crore for the quarter ended September 2025. The company had posted a profit of Rs 659.44 crore in the same quarter last year. Revenue from operations rose 15.45% year-on-year to Rs 16,676.30 crore, compared to Rs 14,444.50 crore in the July-September quarter of the previous fiscal.
- Tata Consultancy Services** is proactively reducing its reliance on H-1B visas by scaling up local hiring in the US. This strategic shift aims to mitigate potential disruptions from the Trump administration's proposed \$100,000 fee on new H-1B petitions and broader visa rule changes.
- IndiGo** has launched its "Flying Connections Sale" from October 13 to 17 for travel between November 1, 2025, and March 31, 2026. One-way domestic fares start at Rs 2,390, while international fares begin at Rs 8,990. The sale covers over 8,000 city pairs, linking 90+ domestic and 40+ international destinations, aiming to make multi-city and connecting travel more accessible.
- Maruti Suzuki** announces significant festive season discounts reaching up to Rs. 1.80 lakh. These offers span across its entire model lineup, including hatchbacks, SUVs, and MPVs. Buyers can avail of cash discounts, exchange bonuses, and scrappage benefits. The move aims to capitalize on increased demand ahead of Diwali and new GST norms.
- ONGC** is implementing a comprehensive cost-cutting strategy to achieve Rs 5,000 crore in savings by 2026-27, preparing for a potential lower oil price cycle. The company is optimizing supply chains, fuel use, and logistics, including reducing inventories and centralizing procurement, to safeguard investor returns amidst falling crude oil prices.
- Bharat Petroleum Corporation** and **Reliance BP Mobility** have partnered to expand city gas distribution and CNG sales across India. This collaboration aims to enhance access to cleaner, affordable fuel, supporting the nation's goal of increasing natural gas's share in the energy mix to 15% by 2030.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ADANI PORTS	1435.00	1409.40	1.82%
BAJFINANCE	1036.75	1023.85	1.26%
BAJAJ-AUTO	9059.00	8946.50	1.26%
SHRIRAMFIN	672.15	665.05	1.07%
INDIGO	5787.50	5735.00	0.92%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TATAMOTORS	660.75	678.95	-2.68%
WIPRO	244.82	248.70	-1.56%
HINDUNILVR	2492.80	2528.90	-1.43%
INFY	1497.60	1514.90	-1.14%
MAXHEALTH	1143.30	1156.40	-1.13%

(Source: [Moneycontrol](#))

- **Jio Financial Services'** subsidiary, Jio Payments Bank has won contract to implement the FASTag Automatic Number Plate Recognition (ANPR)-based MLFF toll collection system at Shahjahanpur and Manoharpura toll plazas.
- **Dr Reddy's Laboratories** and **Zydus Lifesciences** are recalling products in the US due to manufacturing issues. Dr Reddy's is recalling muscle relaxant injections over stability testing failures, while Zydus Lifesciences is recalling antiviral medication for failing impurity specifications. Both recalls are classified as Class II by the USFDA.
- **Prestige Estates Projects Ltd** has launched 620 flats in Ghaziabad, projecting Rs 2,200 crore in revenue as part of its expansion strategy. This follows the successful first phase of its township, 'The Prestige City, Indirapuram', which comprised 3,421 units. The company has reported a significant 50% increase in sales bookings to Rs 6,017.
- The Power Transmission & Distribution (PT&D) vertical of **Larsen & Toubro** has won grid infrastructure orders in Middle East. According to the company's project classification, the orders are valued in the range of Rs 2,500 crore to Rs 5,000 crore.
- **NTPC Green energy** announced that it has signed a memorandum of understanding (MoU) with ENEOS Corporation (ENEOS), Japan to deliver green methanol and green hydrogen derivative products to ENEOS.

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

Global News

- China's trade surplus came in at USD 90.45 billion in September 2025, higher than the USD 81.69 billion recorded in the same month a year earlier. Exports increased by 8.3% year-on-year to a seven-month high of USD 328.6 billion in September 2025, accelerating from a 4.4% gain in August. Imports jumped 7.4% yoy in September 2025, easily exceeding market forecasts of 1.5% and sharply accelerating from a 1.3% growth in the prior month.
- U.S. consumer sentiment index edged down to 55.0 in October from 55.1 in September.
- Germany's wholesale prices rose 1.2% year-on-year in September 2025, quickening from a 0.7% increase in the previous month. On a monthly basis, wholesale prices rose 0.2%, rebounding from a 0.6% fall in August.

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

Economic News

- Crude Oil traded at US\$ 59.81/bbl (IST 17:00).
- INR strengthened to Rs. 88.68 from Rs. 88.70 against each US\$ resulting in daily change of 0.02%.
- General government capital spending is projected at 5 percent of GDP in FY26. This figure is slightly lower than FY25 estimates and significantly below the FY24 peak. Public capex growth has been strong in early FY26. States also show healthy momentum in their capital spending. This sustained focus on investment is positive for economic growth.
- India's sugar exports reached an estimated 7.75 lakh tonnes in the marketing season ending September. Trade body AISTA urged the government to announce an early export quota for the new season, having requested permission for the 2025-26 marketing year by November 2025.
- India is actively addressing over 65 non-tariff barriers impacting its marine and agricultural exports to Russia, aiming to reduce a significant trade deficit. Key concerns include obtaining approval for Indian marine product units for shrimp exports, a crucial step for diversifying shipments after US tariffs.
- India's foreign exchange reserves saw a slight dip. As of October 3, the reserves were \$699.96 billion. This follows a figure of \$700.24 billion reported the previous week.
- India's information and broadcasting sector saw a significant 84% year-on-year drop in FDI inflows to Rs 552.45 crore in the June 2025 quarter. This decline reflects a slowdown in cross-border deals, despite several greenfield and brownfield investments in digital media, advertising, and entertainment segments.

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

Forthcoming Events

Board Meetings as on 14/10/2025

Tech Mahindra Limited	Financial Results/Dividend
ICICI Lombard General Insurance Company Limited	Financial Results/Dividend
ICICI Prudential Life Insurance Company Limited	Financial Results
Indian Renewable Energy Development Agency Limited	Financial Results
Persistent Systems Limited	Financial Results
Thyrocare Technologies Limited	Financial Results/Dividend/Bonus
Aditya Birla Money Limited	Financial Results
Asian Hotels (North) Limited	Fund Raising
Bank of Maharashtra	Financial Results
Cyient DLM Limited	Financial Results
Damodar Industries Limited	Financial Results

GTPL Hathway Limited	Financial Results
Leela Palaces Hotels & Resorts Limited	Financial Results
Navkar Corporation Limited	Financial Results

(Source: NSE)

Corporate Actions as on 14/10/2025

Tata Motors Limited	Demerger
Tata Investment Corporation Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Re 1/- Per Share
Gokul Agro Resources Limited	Face Value Split (Sub-Division) - From Rs 2/- Per Share To Re 1/- Per Share

(Source: NSE)

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