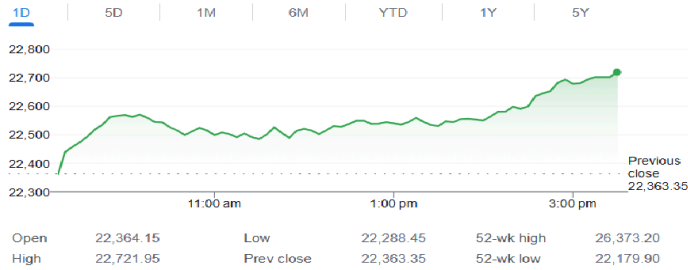


Index Chart

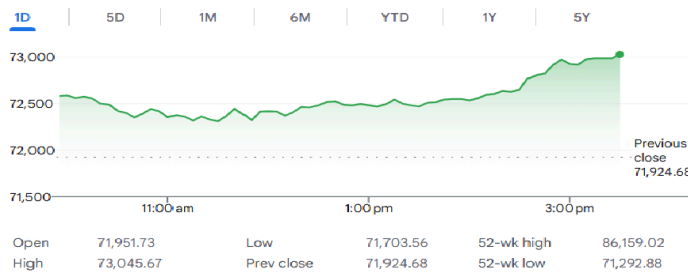
NIFTY 50

22,721.95 ↑ 1.60% +358.60



BSE SENSEX

73,033.78 ↑ 1.54% +1,109.10



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22721.95	22363.35	1.60%
S&P BSE SENSEX	73033.78	71924.68	1.54%
NIFTY MID100	59459.20	58834.55	1.06%
NIFTY SML100	19447.40	19425.80	0.11%

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

Market Wrap Up

- The key equity benchmarks ended with modest cuts, supported by a stronger rupee following recent Reserve Bank of India measures and a decline in Brent crude prices, although oil remained above \$100 a barrel. The Nifty closed above the 22,700 level. Market participants will monitor global cues, key US inflation data, the ongoing September-quarter earnings season and foreign institutional investor (FII) flows.
- The S&P BSE Sensex jumped 1,109.10 points or 1.54% to 73,033.78. The Nifty 50 index climbed 358.60 points or 1.60% to 22,721.95.
- The Nifty Midcap 150 Index rose 0.97% and the Nifty Smallcap Index 250 increased 0.34%.
- Among the sectoral indices, the Nifty IT index (up 5.22%) and the Nifty Realty index (up 2.46%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Pharma index (down 0.01%), the Nifty Healthcare index (up 0.08%) and the Nifty Media index (up 0.42%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **October** series futures witnessed an unwinding of **long** of position. Open Interest has been decreased by **1916** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **RELIANCE, BHEL, BHARTIARTL, ICICIBANK, INFY**.
- Short** position build up for the **October** series has been witnessed in **MARICO, VEDL**.
- Unwinding** position for the **October** series has been witnessed in **SBIN, HDFCBANK**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55481.05	54918.00	1.03%
NIFTY AUTO	25391.85	25084.40	1.23%
NIFTY FMCG	44731.15	44113.40	1.40%
NIFTY IT	29830.10	28349.60	5.22%
NIFTY METAL	12088.25	11951.15	1.15%
NIFTY PHARMA	26075.00	26078.85	-0.01%
NIFTY REALTY	829.95	810.05	2.46%
BSE CG	74607.76	74254.37	0.48%
BSE CD	57970.48	57113.34	1.50%
BSE Oil & GAS	24199.47	24077.15	0.51%
BSE POWER	7038.23	7024.28	0.20%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	67777.52	69030.92	-1.82%
HANG SENG	24345.22	24271.20	0.30%
STRAITS TIMES	5430.50	5415.48	0.28%
SHANGHAI	3800.86	3797.24	0.10%
KOSPI	6035.35	6384.24	-5.46%
JAKARTA	5925.98	5936.15	-0.17%
TAIWAN	48341.31	49301.96	-1.95%
KLSE COMPOSITE	1623.35	1618.01	0.33%
ALL ORDINARIES	8921.50	8937.00	-0.17%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	105778.91	96863.11
NSE F&O	178474.57	133294.25

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1305.13

(Source: [NSE](#))

Corporate News

- HCL Technologies** reported consolidated net profit increased 10.99% to Rs 5,132 crore in Q2 FY27 as compared with Rs 4,624 crore in Q1 FY27. Revenue from operations increased 3.01% quarter on quarter to Rs 35,620 crore in Q2 FY27 as compared with Rs 34,579 crore in Q1 FY27.
- RBL Bank** reported a 170% YoY and 90% QoQ increase in net profit to Rs 481.8 crore in Q2 FY27, compared with Rs 178.5 crore in Q2 FY26 and Rs 253.7 crore in Q1 FY27. NII rose 37% YoY and 29% QoQ to Rs 2,131 crore in Q2 FY27 from Rs 1,551 crore in Q2 FY26 and Rs 1,654 crore in Q1 FY27.
- Kalpataru Projects International** has secured new orders and letters of comfort worth approximately Rs 2,031 crore in its power transmission and distribution (T&D) business across domestic and international markets. Additionally, its Swedish subsidiary, Linjemontage i Grästorps AB, has received an order worth approximately Rs 194 crore.
- Stellantis** has formed a partnership with **Tata Motors Passenger Vehicles** for vehicle production in India. This collaboration will leverage Tata's advanced technology and Stellantis' engineering expertise for competitive vehicle development. A new Jeep SUV will be produced based on Tata's Argos platform, further enhancing export potential.
- HDFC Bank** announced the launch of its annual festival offer, with thousands of deals across various services to provide customers with affordable shopping offers. The initiative would allow customers to save up to Rs 70,000 on festive purchases made using HDFC Bank credit cards and EASYEMI on debit and credit cards. The offer covers Xpress Personal Loans, Xpress Car Loans, and other vehicle loans, home loans, and gold loans.
- NTPC** is currently engaged in discussions with potential buyers from Japan, South Korea, and Germany. The company aims to establish a green hydrogen hub in Andhra Pradesh for producing green ammonia and methanol. These green fuels are becoming increasingly important for industries seeking to reduce emissions effectively. With government support of approximately

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1326.00	1223.00	8.42%
TCS	2269.30	2125.00	6.79%
SHRIRAMFIN	988.00	929.40	6.31%
TECHM	1543.50	1471.00	4.93%
INFY	1062.10	1020.00	4.13%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
RBLBANK	388.05	417.70	-7.10%
ICICIPRULI	447.00	463.40	-3.54%
POWERINDIA	30250.00	31290.00	-3.32%
VEDL	256.30	264.90	-3.25%
MCX	3308.00	3390.00	-2.42%

(Source: [Moneycontrol](#))

- **PNB Gilts** posted net profit to Rs 44.84 crore in the quarter ended September 2026 as against net loss of Rs 45.35 crore during the previous quarter ended September 2025. Sales declined 1.60% to Rs 436.32 crore in the quarter ended September 2026 as against Rs 443.41 crore during the previous quarter ended September 2025.
- **Eimco Elecon (India)** posted net profit rose 46.36% to Rs 7.83 crore in the quarter ended September 2026 as against Rs 5.35 crore during the previous quarter ended September 2025. Sales rose 70.88% to Rs 56.80 crore in the quarter ended September 2026 as against Rs 33.24 crore during the previous quarter ended September 2025.
- **Shyam Metalics Group** has secured strategic mining rights for the Phutamura coal block in Chhattisgarh. The investment in Alom Solar Private Limited aims to ensure a stable, long-term and cost-effective coal supply for its captive power generation and steel manufacturing operations.
- **Persistent Systems** has inaugurated its third facility in Hyderabad at Phoenix Equinox in Gachibowli. The expansion strengthens Persistent's ability to deliver programs in AI deployment, payments modernization, cloud platforms and operational resilience for banking, financial services and insurance clients.
- **Tata Power Company** and Imperial College London, a world-leading UK university, have signed a Memorandum of Understanding (MoU) to explore opportunities for collaboration in research, technology and knowledge exchange across critical areas of energy transition.
- **JTL Industries** has received approval from the Office of the Chief Engineer, Central Public Works Department (CPWD), NDZ -III, New Delhi, for the inclusion of its products in the approved list of preferred makes for works under its jurisdiction.
- **Vikran Engineering** announced that its wholly owned subsidiary, NOPL Solar Projects, had signed a Rs 2,941.19-crore loan agreement with IREDA to partly finance a solar power project in Maharashtra.
- **IRCON International** has received an EPC contract worth Rs 862.46 crore from East Central Railway for track works related to the Son Nagar-Andal third and fourth railway line projects.

\$2.1 billion, India plans to produce five million metric tons of green hydrogen annually by 2030.

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

Global News

- Germany's annual inflation rate accelerated to 3.3% in September 2026, up from 2.9% in August. On a monthly basis, consumer prices rose 0.6% in September, accelerating from a 0.2% gain in August.
- Japan's producer prices rose 6.8% year-on-year in September 2026, slowing from August's pace. On a monthly basis, producer prices fell 0.3%, matching the revised decline in August.

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

Economic News

- Crude Oil traded at US\$ 92.15/bbl (IST 17:00).
- INR strengthened to Rs. 95.29 from Rs. 95.79 against each US\$ resulting in daily change of 0.52%.
- Canada is leading its largest trade delegation to India in more than 30 years, with nearly 300 business delegates set to explore partnerships across key sectors as both countries advance negotiations on a Comprehensive Economic Partnership Agreement (CEPA), Canadian International Trade Minister Maninder Sidhu said.
- IMF has increased India's growth forecast for 2026 due to stronger-than-expected economic momentum. Resilient domestic demand and robust services activity have contributed significantly to this revision. Higher global oil prices have impacted several economies, but India remains an exception. Other major agencies like the World Bank have also raised their forecasts for India's economy. However, risks remain from persistent global uncertainty as well as higher oil prices.
- Kolkata and the United States are strengthening ties across sectors such as defence, IT, and healthcare. Recent military exercises involving 500 troops and significant investments showcase this growing partnership. American companies are establishing production facilities in India, contributing to economic development in both nations. India plays a crucial role in supplying generic medicines to the US, which enhancing trust.
- BMI, a unit of Fitch Solutions has raised India's economic growth forecast for 2026-27 to 7.5% from the previous estimate of 6.8%. The agency cites strong growth momentum and ongoing investment in artificial intelligence as key factors. However, risks from rising oil prices and potential El Nino disruptions could negatively impact growth. Additionally, the forecast for 2027-28 has been adjusted down to 6.3%, reflecting concerns for household consumption.
- India attracted \$351 billion in foreign direct investment (FDI) for greenfield projects during 2021-25, more than double that of China, according to the Boston Consulting Group (BCG). India's performance marked a 61% surge from the \$222 billion greenfield FDI it received in the prior five years. China, in comparison, saw a 54% drop in FDI in newer ventures to \$159 billion from \$350 billion in the same period, and from a peak of \$514 billion peak in 2006-10, per BCG data.
- The government has allowed 5,841 tonnes of sugar to be exported to the European Union (EU) under a quota-based duty concession scheme - tariff rate quota - for 2026-27. "The quantity of 5,841 MT of sugar to be exported to the EU from India under TRQ (tariff rate quota) for the year 2026-27 (October 2026 to September 2027) has been notified," the Directorate

General of Foreign Trade (DGFT) has said in a public notice dated October 9.

- The State Bank of India (SBI) Research has called for the abolition of long-term capital gains (LTCG) tax on equities and an extended holding period of two to three years to attract capital inflows and improve investor sentiment amid sustained foreign portfolio investor (FPI) outflows from Indian equity markets.

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

Forthcoming Events

Board Meetings as on 14/10/2026

Bharat Heavy Electricals Limited	Financial Results
Tata Technologies Limited	Financial Results
ICICI Lombard General Insurance Company Limited	Financial Results/Dividend
HDB Financial Services Limited	Financial Results/Dividend
CEAT Limited	Financial Results
Bajaj Consumer Care Limited	Financial Results
Canara Bank	Financial Results
Aditya Birla Money Limited	Financial Results
Billionbrains Garage Ventures Limited	Financial Results
Elecon Engineering Company Limited	Financial Results/Dividend
Emmvee Photovoltaic Power Limited	Financial Results
Hathway Cable & Datacom Limited	Financial Results
Leela Palaces Hotels & Resorts Limited	Financial Results
Mangalore Refinery and Petrochemicals Limited	Financial Results/Dividend
Reliance Industrial Infrastructure Limited	Financial Results

(Source: NSE)

Corporate Actions as on 14/10/2026

Tata Consultancy Services Limited	Interim Dividend - Rs 12 Per Share
Vedanta Limited	Interim Dividend - Rs 5 Per Share

(Source: NSE)

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