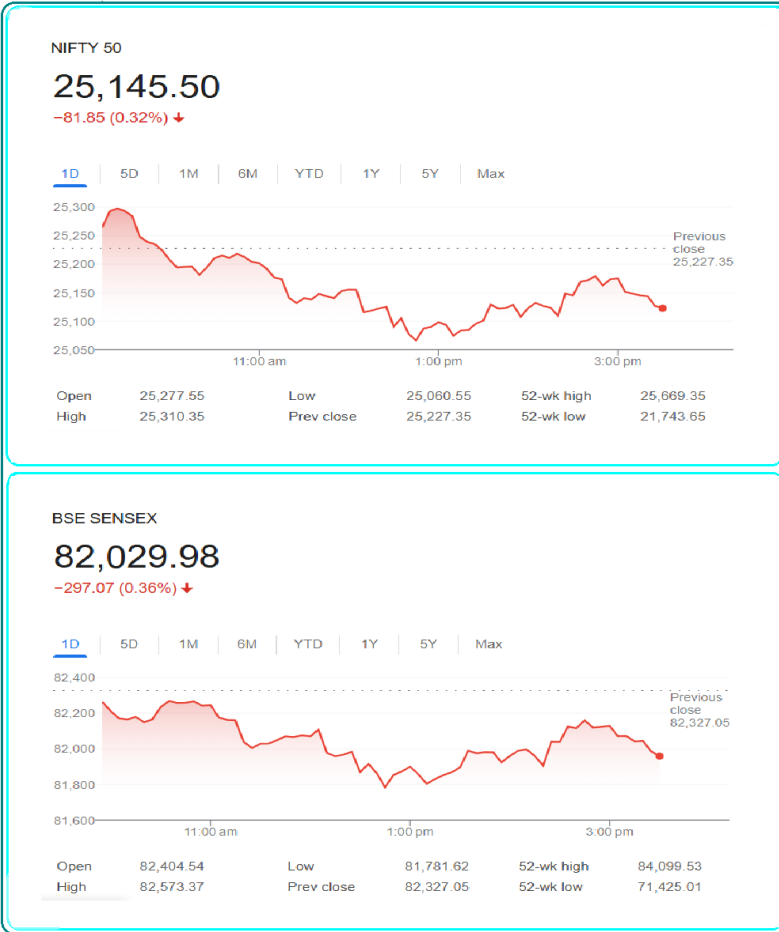


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25145.50	25227.35	-0.32%
S&P BSE SENSEX	82029.98	82327.05	-0.36%
NIFTY MID100	58324.40	58762.35	-0.75%
NIFTY SML100	17940.15	18101.75	-0.89%

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

Market Wrap Up

- The domestic equity benchmarks ended with moderate losses today, marking their second consecutive decline, weighed down by weak global cues and continued foreign fund outflows. Nifty settled below the 25,150 mark
- The S&P BSE Sensex declined 297.07 points or 0.36% to 82,029.98. The Nifty 50 index fell 81.85 points or 0.32% to 25,145.50. In the past two trading sessions, the Sensex and Nifty slipped 0.57% and 0.55%, respectively.
- The S&P BSE Mid-Cap index fell 0.74% and the S&P BSE Small-Cap index tanked 0.95%.
- Among the sectoral indices, the Nifty Auto index (down 0.22%), the Nifty financial services index (down 0.23%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty PSU Bank index (down 1.52%), the Nifty Consumer Durables index (down 1.08%) and the Nifty Media index (down 1.03%) 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 **12208** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **ICICIBANK, ICICIPRULI**.
- Short** position build up for the **November** series has been witnessed in **RELIANCE, LT, SBIN, HDFCBANK, BAJFINANCE, INFY**.
- Unwinding** position for the **November** series has been witnessed in **BHARTIARTL, TECHM, HCLTECH**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56496.45	56625.00	-0.23%
NIFTY AUTO	26640.55	26698.15	-0.22%
NIFTY FMCG	54213.75	54473.85	-0.48%
NIFTY IT	35214.85	35330.80	-0.33%
NIFTY METAL	10116.80	10217.45	-0.99%
NIFTY PHARMA	22039.25	22205.10	-0.75%
NIFTY REALTY	888.35	896.80	-0.94%
BSE CG	68488.70	68963.20	-0.69%
BSE CD	58535.69	59206.35	-1.13%
BSE Oil & GAS	27035.00	27311.09	-1.01%
BSE POWER	6764.73	6796.75	-0.47%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	46847.32	48088.80	-2.58%
HANG SENG	25441.35	25889.48	-1.73%
STRAITS TIMES	4354.52	4389.84	-0.80%
SHANGHAI	3865.23	3889.50	-0.62%
KOSPI	3561.81	3584.55	-0.63%
JAKARTA	8066.52	8227.20	-1.95%
TAIWAN	26793.15	26923.42	-0.48%
KLSE COMPOSITE	1611.46	1615.19	-0.23%
ALL ORDINARIES	9208.50	9183.30	0.27%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	109664.78	91723.49
NSE F&O	187502.64	145434.75

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1508.53

(Source: [NSE](#))

Corporate News

- **HCL Technologies** posted consolidated net sales at Rs 31,942.00 crore in September 2025 up 10.67% from Rs. 28,862.00 crore in September 2024. Net profit at Rs. 4,235.00 crore in September 2025 down 0% from Rs. 4,235.00 crore in September 2024.
- **Bank of Maharashtra** has reported a 23.09% yoy rise in net profit at Rs 1,633 crore during the September quarter, with NII up 15.71% yoy to Rs 3,248 crore.
- **Persistent Systems** Q2 profit jumps 45% YoY to Rs 471 crore, beats estimates on strong margin expansion.
- **Waaree Renewable Technologies** posted consolidated net sales at Rs 774.78 crore in September 2025 up 47.73% from Rs. 524.47 crore in September 2024. Net profit at Rs. 116.30 crore in September 2025 up 117.22% from Rs. 53.54 crore in September 2024.
- **Elecon Engineering Company** posted consolidated net sales at Rs 578.13 crore in September 2025 up 13.77% from Rs. 508.14 crore in September 2024. Net profit at Rs. 87.72 crore in September 2025 down 0% from Rs. 87.72 crore in September 2024.
- **Den Networks** posted consolidated net sales at Rs 241.43 crore in September 2025 down 3.07% from Rs. 249.08 crore in September 2024. Net profit at Rs. 35.16 crore in September 2025 down 32.45% from Rs. 52.05 crore in September 2024.
- **Aurobindo Pharma's** promoter group has raised around Rs. 2,000 crore through a two-tranche promoter financing structure to fund platform acquisitions, including the Taj Banjara asset in Hyderabad. The borrowing is being routed through the promoters' real estate arm, Auro Realty.
- The Supreme Court ruled that land acquired for **Tata Motors'** Nano project in Singur will not be restored to industrial entities. The court clarified its 2016 verdict, stating the relief was for vulnerable farmers, not financially capable commercial enterprises.
- **Hero MotoCorp** has officially launched in the Italian market, partnering with Pelpi International to distribute its Euro 5+ compliant motorcycles. Initially available in

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
MAXHEALTH	1161.50	1143.30	1.59%
WIPRO	248.42	245.13	1.34%
TECHM	1468.00	1450.90	1.18%
APOLLOHOSP	7759.00	7671.00	1.15%
POWERGRDI	287.50	286.15	0.47%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
DRREDDY	1237.30	1262.40	-1.99%
BEL	402.40	409.40	-1.71%
BAJFINANCE	1019.15	1036.75	-1.70%
TCS	2960.30	3007.20	-1.56%
NTPC	336.65	341.70	-1.48%

(Source: [Moneycontrol](#))

key cities through 36 dealerships, the company is introducing the adventure-focused Xpulse 200 4V and Xpulse 200 4V Pro, alongside the versatile Hunk 440.

- **Tata AutoComp Systems Ltd** is expanding into the Indian Railways sector. The company sees significant opportunities in the ongoing modernization of the rail network. Partnerships with global leaders will bring advanced technologies to India. Tata AutoComp is already supplying components for Vande Bharat trains. They will showcase propulsion, HVAC, and seating solutions at IREE 2025.
- **Jio Financial Services** said its subsidiary, Jio Payments Bank (JPBL), has secured a contract to implement the FASTag Automatic Number Plate Recognition (ANPR)-based Multi-Lane Free Flow (MLFF) toll collection system at two plazas - Shahjahanpur and Manoharpura - on the Gurugram-Jaipur highway.
- The Centre has directed **Bharat Heavy Electricals Ltd** to act against errant officers responsible for the Ennore Thermal Power Station (ETPS) steel arch collapse.

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

Global News

- U.K. unemployment rate rose to 4.8% in the three months to August 2025. The number of people claiming unemployment benefits increased by 25.8 thousand to 1.692 million in September 2025, following a revised 2 thousand drop in the previous month.
- Eurozone economic sentiment index fell to 22.7 in October from 26.1 in the previous month. The current conditions index dropped three points to -31.8.
- Germany's consumer price inflation stood at 2.4% in September 2025, up from 2.2% in August. On a monthly basis, consumer prices rose by 0.2%, following a 0.1% increase in August.
- Germany's current account surplus declined to EUR 8.3 billion in August 2025 from EUR 15.4 billion a year earlier.
- Germany's economic sentiment index rose to 39.3 in October from 37.3 in the previous month. The current situation index dropped unexpectedly to -80.0 from -76.4 in September.

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

Economic News

- Crude Oil traded at US\$ 58.28/bbl (IST 17:00).
- INR weakened to Rs. 88.80 from Rs. 88.68 against each US\$ resulting in daily change of 0.14%.
- India's consumer price inflation eased to 1.54% in September 2025, down from 2.07% in August.
- India's wholesale price index-based inflation stood at 0.13% in September on an annual basis as against 0.52% in August.
- Income tax refunds have seen a 16% decrease this year as authorities implemented enhanced filters for payments exceeding a certain threshold to combat fraud. This reduction in refunds has contributed to a 6.3% rise in net direct tax collections, reaching nearly Rs 11.9 lakh crore.
- India's net direct tax collections reached Rs. 11.89 lakh crore between April 1 and October 12, marking a 6.33% year-on-year increase. Despite a 15.98% drop in refunds issued, gross tax collections saw a 2.36% rise to Rs. 13.92 lakh crore. The government has set a net direct tax revenue target of Rs. 25.2 lakh crore for FY26.
- The DPIIT launched PM GatiShakti-Offshore, a digital platform for integrated planning of offshore projects like wind farms and marine exploration. This initiative aims to strengthen India's Blue Economy and support sustainable coastal growth. Additionally, the Logistics Excellence, Advancement, and Performance Shield (LEAPS) 2025 was launched to benchmark logistics excellence and enhance India's competitiveness.
- EPFO has extended the deadline for filing EPF returns for September to October 22, 2025, to accommodate employers adapting to the new revamped ECR system. The labour ministry stated that awareness programs and interactive sessions are being conducted to ensure a smooth transition and timely, error-free filing.

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

Forthcoming Events

Board Meetings as on 15/10/2025

Axis Bank Limited	Financial Results
HDB Financial Services Limited	Financial Results/Dividend
HDFC Asset Management Company Limited	Financial Results/Bonus
HDFC Life Insurance Company Limited	Financial Results/Fund Raising
Tata Communications Limited	Financial Results
Ador Welding Limited	Financial Results
Angel One Limited	Financial Results
L&T Finance Limited	Financial Results
Indian Railway Finance Corporation Limited	Financial Results/Dividend

KEI Industries Limited	Financial Results
Muthoot Capital Services Limited	Financial Results
Nuvoco Vistas Corporation Limited	Financial Results
Obero Realty Limited	Financial Results/Dividend
Welspun Enterprises Limited	Fund Raising
Delta Corp Limited	Financial Results
Hathway Cable & Datacom Limited	Financial Results
Heritage Foods Limited	Financial Results
Huhtamaki India Limited	Financial Results
Kewal Kiran Clothing Limited	Financial Results
Mangalore Refinery and Petrochemicals Limited	Financial Results
MIC Electronics Limited	Financial Results
Quick Heal Technologies Limited	Financial Results
Reliance Industrial Infrastructure Limited	Financial Results
Rossari Biotech Limited	Financial Results
Tips Music Limited	Financial Results/Dividend

(Source: NSE)

Corporate Actions as on 15/10/2025

SKF India Limited	Demerger
Tata Consultancy Services Limited	Interim Dividend - Rs 11 Per Share

(Source: NSE)

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