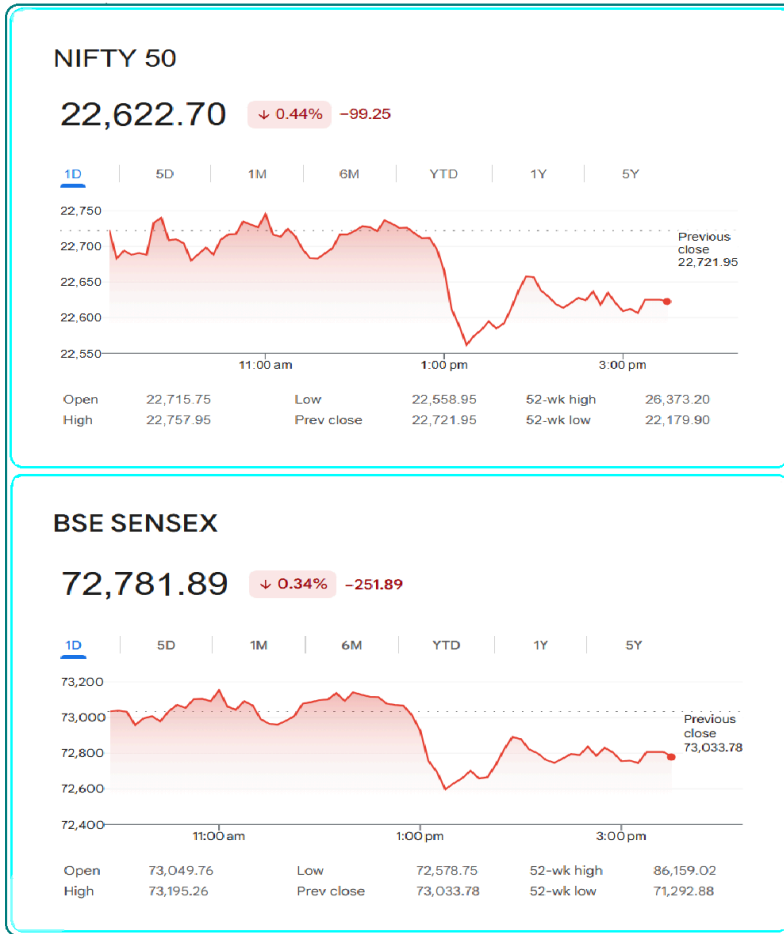


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22622.70	22721.95	-0.44%
S&P BSE SENSEX	72781.89	73033.78	-0.34%
NIFTY MID100	59409.10	59459.20	-0.08%
NIFTY SML100	19384.80	19447.40	-0.32%

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

Market Wrap Up

- The key equity benchmarks ended with modest cuts, weighed down by sustained foreign institutional investor (FII) outflows and elevated crude oil prices. Investor sentiment remained cautious amid the ongoing Q2 earnings season and concerns over rising wholesale inflation, which climbed to 11.39% in September. The Nifty 50 settled below the 22,650 mark.
- The S&P BSE Sensex declined 251.89 points or 0.34% to 72,781.99. The Nifty 50 index fell 99.25 points or 0.44% to 22,622.70.
- The BSE 150 MidCap index shed 0.05%, while the BSE 250 SmallCap index advanced 0.08%.
- Among the sectoral indices, the Nifty FMCG index (up 1.21%), the Nifty IT index (up 1.14%) and the Nifty Oil & Gas index (up 1.04%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Pharma index (down 1.30%), the Nifty Healthcare index (down 1.25%) and the Nifty Auto index (up 0.93%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **October** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **3696** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **RELIANCE, BHEL, INFY**.
- Short** position build up for the **October** series has been witnessed in **BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.
- Unwinding** position for the **October** series has been witnessed in **TATAPOWER, BAJAJ-AUTO**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55316.00	55481.05	-0.30%
NIFTY AUTO	25156.75	25391.85	-0.93%
NIFTY FMCG	45271.70	44731.15	1.21%
NIFTY IT	30171.00	29830.10	1.14%
NIFTY METAL	12006.75	12088.25	-0.67%
NIFTY PHARMA	25736.95	26075.00	-1.30%
NIFTY REALTY	822.80	829.95	-0.86%
BSE CG	75215.78	74607.76	0.81%
BSE CD	57908.61	57970.48	-0.11%
BSE Oil & GAS	24408.04	24199.47	0.86%
BSE POWER	7160.87	7038.23	1.74%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	67744.29	67777.52	-0.05%
HANG SENG	24314.17	24345.22	-0.13%
STRAITS TIMES	5423.33	5430.50	-0.13%
SHANGHAI	3767.23	3800.86	-0.88%
KOSPI	6008.81	6035.35	-0.44%
JAKARTA	5943.02	5925.98	0.29%
TAIWAN	48625.83	48341.31	0.59%
KLSE COMPOSITE	1627.72	1623.35	0.27%
ALL ORDINARIES	8869.00	8921.50	-0.59%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	116560.77	105778.91
NSE F&O	136795.95	178474.57

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1857.44

(Source: [NSE](#))

Corporate News

- **Canara Bank** reported an 8.4% year-on-year rise in Q2 net profit to Rs 5,175 crore on October 14 as compared with Rs 4,774 crore in the year-ago period on the back of an on-year fall in provisions and higher total income. NII increased 20.4% to Rs 11,004 crore from Rs 9,141 crore a year earlier.
- **Hero Motors**'s consolidated net profit surged 115.64% to Rs 10.20 crore in Q1 FY27 compared with Rs 4.73 crore in Q1 FY26. Revenue from operations jumped 24.86% YoY to Rs 319.32 crore in the quarter ended 30th June 2026.
- **ICICI Life Insurance Limited**, formerly ICICI Prudential Life Insurance Company Limited, reported a 25% year-on-year increase in profit after tax (PAT) to Rs 374 crore for the September quarter. The insurer's profit after tax stood at Rs 299 crore in the corresponding quarter last year. The company's net premium earned increased 16.5 percent year-on-year to Rs 13,804 crore in the July-September quarter, compared with Rs 11,843 crore in the year-ago period.
- **Transformers & Rectifiers (India)** reported a 135.3% jump in consolidated net profit to Rs 79.80 crore on a 60.7% increase in revenue from operations to Rs 739.44 crore in Q2 FY27 over Q2 FY26.
- **Tata Elxsi** reported its Q2 FY27 results, with revenue from operations rising 15% year-on-year and 3.4% quarter-on-quarter to Rs 1,055.7 crore.
- **Astranova Mobility**'s lending subsidiary, Novafusion Capital, receives approval from the Reserve Bank of India (RBI) to operate as a Non-Banking Financial Institution (NBFC). The firm targets Rs. 5000 crore in assets under management (AUM) over the next five years, focusing on India's transition to electric mobility. The company highlights the country's requirement of \$100 billion to transition its commercial vehicles to electric mobility.
- **One 97 Communications Ltd.**, the parent company that operates mobile payments pioneer Paytm, witnessed a further increase in domestic shareholding, with Indian investors holding over 56% of the company, at the end of September quarter (Q2 FY 2027).

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
NESTLEIND	1383.20	1334.00	3.69%
TATACONSUM	987.90	960.00	2.91%
INFY	1088.00	1062.10	2.44%
COALINDIA	417.00	408.50	2.08%
TECHM	1575.20	1543.50	2.05%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	950.00	988.00	-3.85%
HDFCLIFE	544.05	560.00	-2.85%
BAJFINANCE	957.00	982.75	-2.62%
M&M	2793.70	2864.40	-2.47%
SBILIFE	1650.00	1687.20	-2.20%

(Source: [Moneycontrol](#))

- Tata Power** is implementing its Rs. 15,000 crore plan to expand its transmission network in Mumbai and is intended to support the increasing energy requirements of hyperscalers and data centres. The company plans to enhance its existing 110 kV and 220 kV networks while developing new receiving stations. The company also aims to expand its green energy projects as well as its overall infrastructure capacity.
- Bank of Baroda** is contending with a \$15 billion lawsuit filed by B.R. Shetty following NMC Health's collapse. Shetty alleges that bank officials facilitated fraudulent transactions and ignored anti-money laundering warnings. The bank is currently pursuing recovery proceedings against Shetty for significant outstanding dues. Bank of Baroda has stated that it has not been served with the lawsuit yet.
- Transrail Lighting** has received new orders worth Rs 408 crore which has further strengthened the orderbook position of the Company. With this, the year-to-date order intake position stands at Rs 2,429 crore.
- RailTel Corporation of India** has received a contract from State Bank Of India for Continuation of MPLS Links to SBI DC-DR and Branches along with P2P links across India at revised rates for a period of 5 years with effect from 01 April 2026 to 31 March 2031. The contract is valued at Rs 197.17 crore.
- Bharat Electronics** announced that it has secured additional orders worth Rs 533 crore since its last disclosure on 17 September 2026.
- Adani Enterprises** and Jabil are forming a joint venture to manufacture artificial intelligence and data centre equipment in India. This venture aims to produce AI racks, servers, storage, and networking equipment for data centres. Furthermore, it will include equipment needed for power supply and cooling systems. The companies anticipate meeting both domestic demand and supporting exports in the market.
- The National Institute of Securities Markets (NISM) and **Computer Age Management Services (CAMS)** have entered into a collaboration to integrate CAMS Lens into the Regulatory Intelligence module of the NISM Compliance & RegTech Lab.

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

Global News

- China's annual inflation rate edged up to 0.9% in September 2026 from 0.8% in August. On a monthly basis, consumer prices rose 0.2%, below forecasts of 0.3% and slowing from August's six-month high of 0.4%.
- China's annual producer price inflation accelerated to 5.0% in September 2026 from 3.8% in August. On a monthly basis, the PPI rose 1.2%, accelerating from August's 0.4% gain. In the first nine months of the year, producer prices increased 2.3% compared to the same period last year.
- China's trade surplus widened to \$133.53 billion in September 2026, up from \$88.72 billion a year earlier. Exports jumped 36.30% yoy to \$447.18 billion while imports jumped 31.0% yoy to a record high of \$313.66 billion.
- U.S. existing home sales rose by 1.5% from the two-year low in the previous month to a seasonally adjusted annualized rate of 3.99 million units in September of 2026.
- Germany's wholesale prices jumped by 8.7% year-on-year in September 2026, accelerating from 6.8% in the previous month. On a monthly basis, wholesale prices rose by 1.9% in September, accelerating from a 0.9% increase in the previous month.
- Germany's current account surplus edged down to EUR 10.3 billion in August 2026 from a revised EUR 10.9 billion in the same month last year.

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

Economic News

- Crude Oil traded at US\$ 95.41/bbl (IST 17:00).
- INR strengthened to Rs. 95.16 from Rs. 95.29 against each US\$ resulting in daily change of 0.14%.
- India's wholesale prices increased 11.39% year-on-year in September 2026, accelerating from a 9.92% rise in August.
- The Finance Ministry has notified an amendment to the India-Mauritius Double Taxation Avoidance Agreement (DTAA), introducing a Principal Purpose Test (PPT) effective August 10. The provision allows tax authorities to deny treaty benefits if they establish that obtaining a tax advantage was one of the principal purposes of a transaction or arrangement.

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

Forthcoming Events

Board Meetings as on 15/10/2026

Nestle India Limited	Financial Results
Tech Mahindra Limited	Financial Results/Dividend/Bonus
L&T Finance Limited	Financial Results
Wipro Limited	Financial Results
Jio Financial Services Limited	Financial Results
HDFC Asset Management Company Limited	Financial Results
HDFC Life Insurance Company Limited	Financial Results/Fund Raising
Angel One Limited	Financial Results/Dividend
Persistent Systems Limited	Financial Results
360 ONE WAM LIMITED	Financial Results/Dividend
5Paisa Capital Limited	Financial Results
CCL Products (India) Limited	Financial Results
Cyient DLM Limited	Financial Results
D.B.Corp Limited	Financial Results
Fedbank Financial Services Limited	Financial Results
Fujiyama Power Systems Limited	Fund Raising
Garuda Construction and Engineering Limited	Dividend
Heritage Foods Limited	Financial Results
IIFL Finance Limited	Financial Results
Indian Bank	Financial Results/Fund Raising
Indian Railway Finance Corporation Limited	Financial Results/Dividend
Karur Vysya Bank Limited	Financial Results
Mahindra EPC Irrigation Limited	Financial Results
Mangalam Worldwide Limited	Financial Results
Metro Brands Limited	Financial Results
Orient Electric Limited	Financial Results
Oriental Hotels Limited	Financial Results
Polycab India Limited	Financial Results
Sri Lotus Developers and Realty Limited	Financial Results
Sterling and Wilson Renewable Energy Limited	Financial Results
Tata Communications Limited	Financial Results
The South Indian Bank Limited	Financial Results
Tips Music Limited	Financial Results/Dividend
UCO Bank	Financial Results
Alok Industries Limited	Financial Results
Artemis Electricals and Projects Limited	Dividend

Butterfly Gandhimathi Appliances Limited

Financial Results

(Source: NSE)

Corporate Actions as on 15/10/2026

Anand Rathi Wealth Limited

Interim Dividend - Rs 4 Per Share

Shivam Autotech Limited

Rights 19:25 @ Premium Rs 10/-

Shraddha Prime Projects Limited

Rights 3:20 @ Premium Rs 150/-

(Source: NSE)

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