

## Index Chart

### NIFTY 50

25,239.10

+169.90 (0.68%)



### BSE SENSEX

82,380.69

+594.95 (0.73%)



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25239.10	25069.20	0.68%
S&P BSE SENSEX	82380.69	81785.74	0.73%
NIFTY MID100	58799.55	58486.10	0.54%
NIFTY SML100	18298.35	18127.00	0.95%

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

## Market Wrap Up

- The domestic equity benchmarks ended with major gains today, supported by positive cues from ongoing U.S. trade negotiations with China and India. Investor sentiment was upbeat on signs of diplomatic progress, while attention now turns to the U.S. Federal Reserve's upcoming interest rate decision, which could set the tone for global markets in the near term. The Nifty settled above the 25,200 level. The S&P BSE Sensex rallied 594.95 points or 0.73% to 82,380.69. The Nifty 50 index added 169.90 points or 0.68% to 25,239.10. The S&P BSE Mid-Cap index rose 0.62% and the S&P BSE Small-Cap index added 0.66%. The market breadth was strong.
- Among the sectoral indices, the Nifty Auto index (up 1.44%), the Nifty Realty index (up 1.07%) and the Nifty IT index (up 0.86%) outperformed the Nifty 50 index. Meanwhile, the Nifty FMCG index (down 0.27%), the Nifty PSU Bank index (up 0.43%) and the Nifty Financial Services index (down 0.40%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **September** series futures witnessed an unwinding of **short** position. Open Interest has been decreased by **5767** contracts at the end of the day.
- Long** position build up for the **September** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- Short** position build up for the **September** series has been witnessed in **BAJFINANCE**, **AUBANK**, **TORNTPOWER**.
- Unwinding** position for the **September** series has been witnessed in **ONGC**, **BAJAJ-AUTO**, **BRITANNIA**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55147.60	54887.85	0.47%
NIFTY AUTO	27146.40	26760.65	1.44%
NIFTY FMCG	56398.65	56551.35	-0.27%
NIFTY IT	36212.15	35902.15	0.86%
NIFTY METAL	9973.45	9891.00	0.83%
NIFTY PHARMA	22264.55	22198.70	0.30%
NIFTY REALTY	915.35	905.65	1.07%
BSE CG	70738.19	70115.39	0.89%
BSE CD	61575.57	61347.24	0.37%
BSE Oil & GAS	26449.63	26275.62	0.66%
BSE POWER	6780.73	6724.29	0.84%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	44902.27	44768.12	0.30%
HANG SENG	26438.51	26446.56	-0.03%
STRAITS TIMES	4337.74	4338.42	-0.02%
SHANGHAI	3861.86	3860.50	0.04%
KOSPI	3449.62	3407.31	1.24%
JAKARTA	7957.70	7937.12	0.26%
TAIWAN	25629.64	25357.16	1.07%
KLSE COMPOSITE	CLOSED	CLOSED	-
ALL ORDINARIES	9151.20	9120.90	0.33%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	91048.46	85104.65
NSE F&O	134821.08	104635.07

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1268.59

(Source: [NSE](#))

## Corporate News

- **Tata Consultancy Services** has announced a multi-year partnership with ARN Media, one of Australia's leading audio-led entertainment companies, to transform its technology and business operations, based on TCS' deep domain expertise in the media and entertainment industry.
- **Adani Enterprises** has received a letter of award (LoA) from National Highways Logistics Management (NHLML) to construct the much-anticipated ropeway project connecting Sonprayag to Kedarnath. The project will be executed by AEL's roads, metro, rail, and water (RMRW) division. The company has announced an investment of Rs 4,081 crore in its maiden ropeway project.
- The Heavy Civil Infrastructure (HCI) business vertical of **Larsen & Turbo** has won a significant order from Nuclear Power Corporation of India (NPCIL) for 2X1000 Mwe Kudankulam Nuclear Power Project (KKNPP - 5 & 6) in Tamil Nadu. According to the company's project classification, the value of this order ranges between Rs 1,000 crore to Rs 2,000 crore.
- **JSW Infrastructure** announced that JSW Kolkata Container Terminal has entered into concession agreement with the port authority of Syama Prasad Mookerjee Port Authority, Kolkata, for a period of 30 years.
- **NCC Limited** has secured a Rs 2,090 crore project from the Water Resource Department for the construction of the Barnar reservoir in Bihar's Jamui district. This long-awaited project, initially approved in 1975, aims to develop dam structures and irrigation channels. The project faced delays and cost revisions, with the state government having already spent Rs. 63.89 crore.
- **Birla Corporation Limited** aims to strengthen its cement business, targeting a production capacity of 27.6 million tonnes by 2029 with a proposed investment of Rs 4335 crore. The company is also exploring diversification opportunities and focusing on renewable energy while striving to protect its market share in central India and improve price realization.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
KOTAKBANK	2021.70	1970.80	2.58%
LT	3667.80	3586.20	2.28%
M&M	3608.00	3530.30	2.20%
MARUTI	15573.00	15265.00	2.02%
BHARTIARTL	1939.50	1904.50	1.84%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
TATACONSUM	1092.10	1102.60	-0.95%
SHRIRAMFIN	618.10	623.65	-0.89%
ASIANPAINT	2480.90	2502.60	-0.87%
BAJFINANCE	1003.25	1009.85	-0.65%
NESTLEIND	1205.60	1212.50	-0.57%

(Source: [Moneycontrol](#))

- **KPI Green Energy** is set to secure a 32 billion rupee loan from the State Bank of India to boost production capacity at its renewable power plants, aligning with India's green energy goals. The company also issued its inaugural green bond, aiming to raise 6.

- Jaguar Land Rover, owned by **Tata**, has extended its production pause until September 24 due to a cybersecurity incident. The company is continuing its forensic investigation and planning a controlled restart of global operations. Jaguar Land Rover apologized for the ongoing disruption and said updates will be provided as the investigation progresses.

- **Suzlon Group** has received an order of 838 MW from Tata Power Renewable Energy. This is for their firm and dispatchable renewable energy project. The project will consist of 266 wind turbines across Karnataka, Maharashtra, and Tamil Nadu. Girish Tanti of Suzlon Group expressed pride in supporting Tata Power's clean energy goals.

- **Bharti Airtel** has reported a significant decrease in cybercrime complaints due to its anti-fraud initiatives, as confirmed by the Indian Cyber Crime Coordination Centre (I4C) and the Ministry of Home Affairs (MHA). The MHA-I4C found a 687.7% decrease in financial losses and a 14.3% drop in overall cybercrime incidents on the Airtel network.

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

## Global News

- U.K. unemployment rate stood at 4.7% in the three months to July 2025, unchanged from the previous period. The number of people claiming unemployment benefits increased by 17.4 thousand to 1.686 million in August 2025, following an upwardly revised 33.3 thousand drop in the previous month.
- Eurozone industrial production inched higher by 0.3% from the previous month in July of 2025, trimming the revised 0.6% drop in the earlier period. From the previous year, industrial output grew by 1.8% in July, picking up from the 0.7% increase in June.
- Eurozone ZEW Indicator of Economic Sentiment rose by 1 point from the prior month to 26.1 in September 2025. The current economic situation increased by 2.4 points to -28.8.
- German ZEW indicator of economic confidence rose unexpectedly to 37.3 in September from 34.7 in the previous month. The current situation index fell more-than-expected to -76.4 from -68.6 in August.

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

## Economic News

- Crude Oil traded at US\$ 63.68/bbl (IST 17:00).
- INR strengthened to Rs. 88.07 from Rs. 88.21 against each US\$ resulting in daily change of 0.16%.
- Morgan Stanley anticipates the Reserve Bank of India (RBI) to reduce policy rates by 25 basis points in both October and December, potentially bringing the terminal policy rate down to 5%. This easing is expected due to inflation consistently falling below the RBI's 4% target, with projections indicating an average CPI of 2.4% in FY26.
- India's agriculture sector has achieved a remarkable 3.7% growth in the first quarter of 2025-26, the highest globally, according to Agriculture Minister Shivraj Singh Chouhan. This rebound from last year's 1.5% growth underscores the success of farmer-friendly policies. Chouhan emphasized collaborative efforts under the 'One Nation, One Agriculture and One Team' initiative and warned against spurious inputs.

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

## Forthcoming Events

### Board Meetings as on 17/09/2025

3i Infotech Limited	Fund Raising
The State Trading Corporation of India Limited	Financial Results
Ugro Capital Limited	Fund Raising

(Source: NSE)

### Corporate Actions as on 17/09/2025

Garware Hi-Tech Films Limited	Dividend - Rs 12 Per Share
63 moons technologies limited	Dividend - Rs 1.20 Per Share
Ashapura Minechem Limited	Dividend - Re 1 Per Share
CARYSIL LIMITED	Dividend - Rs 2.40 Per Share
Heranba Industries Limited	Dividend - Re 1 Per Share
KRBL Limited	Dividend - Rs 3.50 Per Share
N R Agarwal Industries Limited	Dividend - Rs 2 Per Share
Prakash Industries Limited	Dividend - Rs 1.50 Per Share
RITES Limited	Dividend - Rs 2.65 Per Share
Shilpa Medicare Limited	Dividend - Re 1 Per Share
Synergy Green Industries Limited	Dividend - Re 1 Per Share

Vidhi Specialty Food Ingredients Limited  
ZUARI INDUSTRIES LIMITED

Dividend - Rs 1.50 Per Share  
Dividend - Re 1 Per Share

(Source: NSE)

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