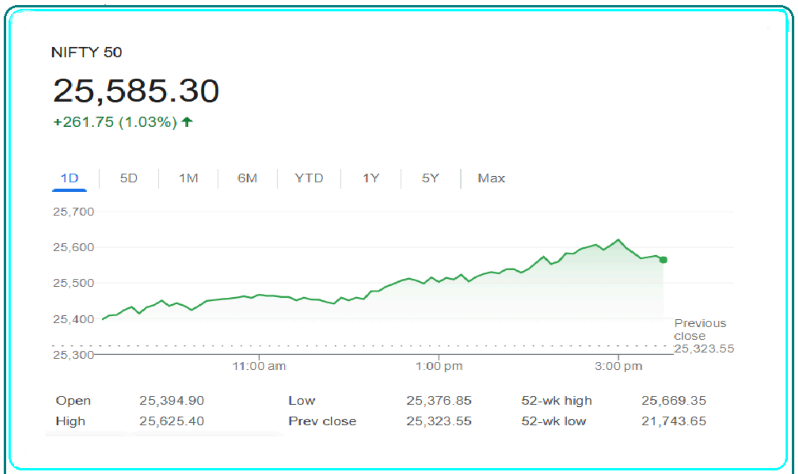
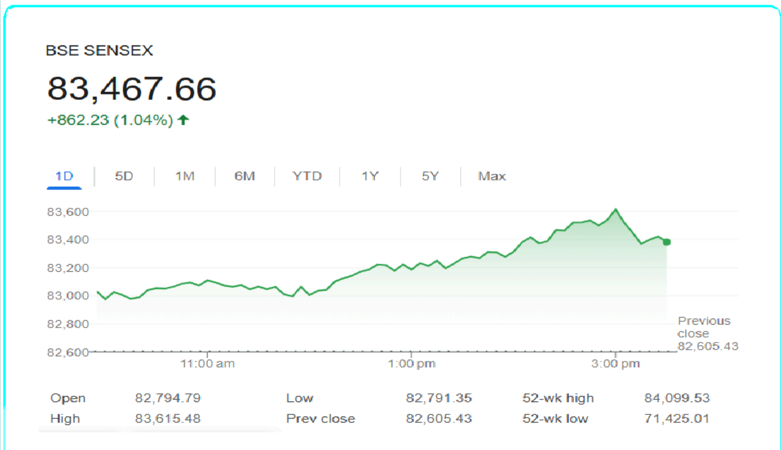
SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY DAILY REPORT

16th October 2025

Index Chart





(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25585.30	25323.55	**1.03%**
S&P BSE SENSEX	83467.66	82605.43	**1.04%**
NIFTY MID100	59241.15	58970.00	**0.46%**
NIFTY SML100	18131.85	18088.05	**0.24%**

(Source: NSE, BSE)

Market Wrap Up

- The key equity indices closed with substantial gains today, extending their winning streak to the second session, aided by stock-specific action amid the ongoing Q2 earnings season and sustained foreign fund inflows. The Nifty settled above the 24,550 mark.
- The S&P BSE Sensex surged 862.23 points or 1.04% to 83,467.66. The Nifty 50 soared 261.75 points or 1.03% to 25,585.30. In the past two trading sessions, the Sensex and Nifty jumped 1.75% each, respectively.
- The S&P BSE Mid-Cap index gained 0.29% and the S&P BSE Small-Cap index rose 0.47%.
- Among the sectoral indices, the Nifty FMCG index (up 2.02%), the Nifty Realty index (up 1.90%) and the Nifty Consumer Durables index (up 1.53%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty PSU Bank index (down 0.44%), the Nifty Pharma index (up 0.21%) and the Nifty Media index (up 0.29%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **5343** contracts at the end of the day.
- **Long** position build up for the **November** series has been witnessed in **RELIANCE**, **LT**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **BAJFINANCE**.
- **Short** position build up for the **November** series has been witnessed in **BHARTIARTL**, **INFY**, **ETERNAL**.
- **Unwinding** position for the **November** series has been witnessed in **HDFCAMC**, **ICICIGI**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57422.55	56799.90	1.10%
NIFTY AUTO	27048.75	26708.65	1.27%
NIFTY FMCG	55853.90	54748.70	2.02%
NIFTY IT	35531.05	35401.80	0.37%
NIFTY METAL	10287.25	10218.00	0.68%
NIFTY PHARMA	22103.20	22057.30	0.21%
NIFTY REALTY	932.80	915.40	1.90%
BSE CG	69238.22	69086.68	0.22%
BSE CD	60134.46	59238.47	1.51%
BSE Oil & GAS	27396.51	27284.78	0.41%
BSE POWER	6862.97	6835.80	0.40%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	48277.74	47672.67	1.27%
HANG SENG	25888.50	25910.60	-0.09%
STRAITS TIMES	4356.20	4368.42	-0.28%
SHANGHAI	3916.23	3912.21	0.10%
KOSPI	3748.37	3657.28	2.49%
JAKARTA	8124.76	8051.17	0.91%
TAIWAN	27647.87	27275.71	1.36%
KLSE COMPOSITE	1612.29	1611.55	0.05%
All ORDINARIES	9375.90	9299.00	0.83%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	111717.03	100716.49
NSE F&O	175453.02	150536.33

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	997.29
NET SELL	-

(Source: NSE)

Corporate News

- **L&T Finance** posted consolidated net sales at Rs 4,335.75 crore in September 2025 up 7.87% from Rs. 4,019.34 crore in September 2024. Net profit at Rs. 734.84 crore in September 2025 up 5.64% from Rs. 695.58 crore in September 2024.

- **Nestle India Ltd** reported a 23.6% year-on-year decline in standalone net profit to Rs 753.2 crore for the July-September quarter of FY26. Revenue rose 10.6% on-year to Rs 5,643.6 crore.

- **HDFC Life Insurance Company**'s consolidated net profit increased 3.01% to Rs 448.29 crore in Q2 FY26 compared with Rs 435.18 crore in Q2 FY25. Net premium income jumped 13.59% YoY to Rs 18,871.23 crore in Q2 FY26. Net income from investments fell 87.8% to Rs 1,417.36 crore in Q2 FY26 as compared to Rs 11,613.28 crore posted in same quarter last year.

- **Oberoi Realty** posted consolidated net sales at Rs 1,779.04 crore in September 2025 up 34.79% from Rs. 1,319.89 crore in September 2024. Net profit at Rs. 760.26 crore in September 2025 up 28.98% from Rs. 589.44 crore in September 2024.

- **Mastek** posted consolidated net profit declined 24.25% to Rs 97.45 crore in the quarter ended September 2025 as against Rs 128.65 crore during the previous quarter ended September 2024. Sales rose 8.41% to Rs 940.37 crore in the quarter ended September 2025 as against Rs 867.39 crore during the previous quarter ended September 2024.

- **Indian Bank** posted consolidated net profit rose 11.01% to Rs 3107.97 crore in the quarter ended September 2025 as against Rs 2799.70 crore during the previous quarter ended September 2024. Total Operating Income rose 8.19% to Rs 16628.28 crore in the quarter ended September 2025 as against Rs 15369.01 crore during the previous quarter ended September 2024.

- **Indian Overseas Bank** posted consolidated net profit rose 61.47% to Rs 1258.82 crore in the quarter ended September 2025 as against Rs 779.61 crore during the previous quarter ended September 2024. Total Operating Income rose 14.55% to Rs 7850.89 crore in the quarter ended September 2025 as against Rs 6853.94 crore during

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
NESTLEIND	1275.60	1221.40	**4.44%**
TATACOMM	1149.30	1114.20	**3.15%**
KOTAKBANK	2205.40	2149.60	**2.60%**
TITAN	3640.30	3549.00	**2.57%**
AXISBANK	1196.30	1169.60	**2.28%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ETERNAL	343.20	354.35	**-3.15%**
HDFCLIFE	742.85	761.15	**-2.40%**
SHRIRAM	672.50	677.15	**-0.69%**
SBILIFE	1835.70	1840.60	**-0.27%**
INFY	1471.50	1474.40	**-0.20%**

(Source: Moneycontrol)

- **TVS** has introduced the Apache RTX 300 in India. This new adventure tourer enters a competitive segment. The bike boasts a 299 cc engine delivering 35.5 hp and 28.5 Nm. It features a steel trellis frame and a full-colour TFT display. Multiple ride and ABS modes enhance its versatility. The Apache RTX 300 is priced at Rs 1.99 lakh.

- **Ola Electric** has entered India's burgeoning battery energy storage systems market with the launch of Ola Shakti, its first residential BESS solution. This move aims to leverage the country's energy storage opportunity, turning it into energy independence by enabling homes to store and intelligently use clean energy.

- **IRCTC**'s new Bharat Gaurav Tourist Train, the Rameswaram-Tirupati Dakshin Darshan Yatra, embarks on a 9-night, 10-day spiritual journey starting November 7, 2025. This package covers major pilgrimage sites across five South Indian states, including Tirupati, Rameswaram, Madurai, Kanyakumari, and Thiruvananthapuram, offering a comprehensive religious tour.

- Google, **Adani Enterprises**, and **Bharti Airtel** are investing $15 billion over five years to build India's largest AI hub and data centre campus in Visakhapatnam. This initiative will feature gigawatt-scale data centres powered by clean energy, new the previous quarter ended September 2024.

- **Ashok Leyland** announced that it has bagged an order from TNSTU's (Tamil Nadu State Transport Undertakings) for 1937 buses. This landmark order further strengthens Ashok Leyland's long-standing partnership with the TNSTU and reaffirms its dominant position in the bus industry.

- **NTPC Ltd** has invited bids for a 1,800 tonnes per year sustainable aviation fuel (SAF) plant in Pudimadaka, Andhra Pradesh. The project encompasses design, engineering, construction, and supply, with bids due by November 6. This initiative aligns with projections suggesting India could produce 8-10 million tonnes of SAF annually by FY40.

- **Nuvoco Vistas Corporation** posted consolidated net sales at Rs 2,457.57 crore in September 2025 up 8.33% from Rs. 2,268.58 crore in September 2024. Net profit at Rs. 36.43 crore in September 2025 up 142.77% from Rs. 85.17 crore in September 2024.

- **Delta Corp** posted consolidated net sales at Rs 182.76 crore in September 2025 down 2.61% from Rs. 187.65 crore in September 2024. Net profit at Rs. 25.10 crore in September 2025 down 6.97% from Rs. 26.98 crore in September 2024.

- **Mangalore Refinery and Petrochemicals** posted consolidated net sales at Rs 22,648.57 crore in September 2025 down 9.29% from Rs. 24,967.87 crore in September 2024. Net profit at Rs. 627.36 crore in September 2025 up 190.02% from Rs. 696.94 crore in September 2024.

- **KEI Industries** posted consolidated net sales at Rs 2,726.35 crore in September 2025 up 19.6% from Rs. 2,279.65 crore in September 2024. Net profit at Rs. 203.51 crore in September 2025 up 31.46% from Rs. 154.81 crore in September 2024.

- **Reliance Industrial Infrastructure** posted consolidated net sales at Rs 12.17 crore in September 2025 down 0.54% from Rs. 12.24 crore in September 2024. Net profit at Rs. 3.06 crore in September 2025 down 2% from Rs. 3.12 crore in September 2024.

- **Network 18 Media & Investments** posted consolidated net sales at Rs 497.81 crore in September 2025 down 72.73% from Rs. 1,825.18 crore in September 2024. Net subsea cable landings, and a robust fibre network, aiming to bring Google's AI capabilities closer to Indian businesses and developers.

- **KEC International** announced that it had secured a new order of Rs 1,038 crore for design, supply and installation of 380 kV GIS Substation in Saudi Arabia.

- **Bharat Electronics** has announced that it has secured additional orders valued at Rs 592 crore since its last disclosure on 29 September 2025.

profit at Rs. 40.68 crore in September 2025 up 142.45% from Rs. 95.84 crore in September 2024.

- **Hathway Cable and Datacom** posted consolidated net sales at Rs 536.67 crore in September 2025 up 4.67% from Rs. 512.74 crore in September 2024. Net profit at Rs. 18.26 crore in September 2025 down 29.22% from Rs. 25.80 crore in September 2024.

(Source: Business Standard, Economic Times, Smart investor)

Global News

- U.K.'s monthly real GDP rose by 0.1% in August 2025, following a downwardly revised 0.1% decline in July. The monthly real GDP rose by 1.3% year-on-year in August 2025, following an upwardly revised 1.5% increase in the previous month.

- U.K. trade deficit widened to GBP 3.39 billion in August 2025, up from a downwardly revised GBP 3.02 billion in July, marking the largest gap since March. Exports fell by 1.2% mom to GBP 77.42 billion, while imports dropped by 0.7% to GBP 80.81 billion.

- U.K. industrial production rose by 0.4% month-on-month in August 2025, rebounding from a downwardly revised 0.4% fall in the previous month. On a yearly basis, industrial activity fell by 0.7% in August, slipping further from a revised 0.1% drop in July.

- U.K. manufacturing production rose 0.7% month-over-month in August 2025, following a downwardly revised 1.1% decline in July. On a yearly basis, manufacturing activity decreased 0.8% in August, slipping further from a revised 0.1% fall in the previous month.

- Eurozone trade surplus fell to EUR 1.0 billion in August 2025, down from EUR 3.0 billion a year earlier.

- Australia's seasonally adjusted unemployment rate rose to 4.5% in September 2025, above both August's upwardly revised figure. Employment rose by 14,900 to a fresh high of 14.64 million, following an upwardly revised loss of 11,800 in August.

- Japan's core machinery orders fell 0.9% month-over-month to Yen 8890 billion in August 2025, improving from a sharp 4.6% drop in July. On an annual basis, private-sector orders rose 1.6% in August, easing from a 4.9% gain in July.

(Source: Market Watch, RTT News, Reuters, Bloomberg)

Economic News

- Crude Oil traded at US$ 58.84/bbl (IST 17:00).
- INR strengthened to Rs. 87.83 from Rs. 88.08 against each US$ resulting in daily change of 0.28%.
- India's unemployment rate edged up to 5.2% in September from 5.1% in August. Rural unemployment rate rose to 4.6% in September from 4.3% in August, with male and female unemployment rate rising to 4.7% and 4.3%, respectively.
- Indian exports to the United States saw a sharp decline of 37.5 percent over four months. This significant drop followed Washington's imposition of 50 percent tariffs on most Indian goods. Shipments fell from USD 8.8 billion in May 2025 to USD 5.5 billion in September 2025. Sectors like textiles and gems and jewellery were hit hardest.
- Launching from the vibrant heart of New Delhi, the innovative platform Global AgXelerate is set to transform the agricultural landscape in India. This new initiative is designed to seamlessly connect local agricultural pioneers with international markets, engaging a network of startups, incubators, and investors from around the world.
- India has increased the base import prices for gold, silver, and all vegetable oils to align with escalating global market rates. This bi-fortnightly revision impacts tax calculations for importers, with gold now at $1327 per 10 grams and silver at $1663 per kg.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 17/10/2025

Reliance Industries Limited	Financial Results
JSW Steel Limited	Financial Results
L&T Technology Services Limited	Financial Results/Dividend
Oracle Financial Services Software Limited	Financial Results/Dividend
REC Limited	Financial Results/Dividend
Havells India Limited	Financial Results
Tata Technologies Limited	Financial Results
Bank of India	Financial Results
CEAT Limited	Financial Results
CRISIL Limited	Financial Results/Dividend
Dalmia Bharat Limited	Financial Results/Dividend
360 ONE WAM LIMITED	Financial Results/Dividend
Anupam Rasayan India Limited	Financial Results
Atlanta Electricals Limited	Financial Results

Atul Limited	Financial Results
JSW Energy Limited	Financial Results
AU Small Finance Bank Limited	Financial Results
Bajaj Healthcare Limited	Financial Results
Central Bank of India	Financial Results/Dividend
CESC Limited	Financial Results/Dividend
DCB Bank Limited	Financial Results
Dixon Technologies (India) Limited	Financial Results
Fedbank Financial Services Limited	Financial Results
HFCL Limited	Financial Results
Himadri Speciality Chemical Limited	Financial Results
Hindustan Zinc Limited	Financial Results
Indiamart Intermesh Limited	Financial Results
Jana Small Finance Bank Limited	Financial Results
Jindal Saw Limited	Financial Results
Karur Vysya Bank Limited	Financial Results
Liberty Shoes Limited	Financial Results
Mahindra EPC Irrigation Limited	Financial Results
NELCO Limited	Financial Results
Orient Electric Limited	Financial Results
Oriental Hotels Limited	Financial Results
Parsvnath Developers Limited	Financial Results
PCBL Chemical Limited	Financial Results/Dividend
Polycab India Limited	Financial Results
Poonawalla Fincorp Limited	Financial Results
PSP Projects Limited	Financial Results
PVR INOX Limited	Financial Results
RPG Life Sciences Limited	Financial Results
Sapphire Foods India Limited	Financial Results
Shoppers Stop Limited	Financial Results
Sobha Limited	Financial Results
Sterling and Wilson Renewable Energy Limited	Financial Results
Tanla Platforms Limited	Financial Results/Dividend
Tejas Networks Limited	Financial Results
The India Cements Limited	Financial Results
TTK Healthcare Limited	Financial Results
UCO Bank	Financial Results
Ujjivan Small Finance Bank Limited	Financial Results
Wendt (India) Limited	Financial Results

(Source: NSE)

Corporate Actions as on 17/10/2025

A B Infrabuild Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Re 1/- Per Share
Anand Rathi Wealth Limited	Interim Dividend - Rs 6 Per Share
HCL Technologies Limited	Interim Dividend - Rs 12 Per Share
Rolex Rings Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Re 1/- Per Share

(Source: NSE)

DISCLAIMER

This document has been prepared by Shriram Insight Share Brokers Ltd. and is meant for sole use by the recipient and not for circulation. This document is not to be reported or copied or made available to others. The information contained herein is from sources believed reliable. It should not be considered as an offer to sell or a solicitation to buy any security or as an official confirmation of any transaction. We do not represent that it is accurate or complete and it should not be relied upon as such. This document is prepared for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The investments discussed or recommended in this report may not be suitable for all investors. Shriram Insight Share Brokers Ltd. Stock Recommendation Service is a general recommendation service and is not to be construed as an individual investor-specific Portfolio Management and Advisory Service.

The user assumes the entire risk of any use made of this information. Each recipient of this document should arrive at an independent evaluation of an investment in the securities of companies referred to in this document and should consult their own advisors to determine the merits and risks of such an investment.

Shriram Insight Share Brokers Ltd. shall not be responsible for any loss or liability incurred to the user as a consequence of his or any other person on his behalf taking any investment decisions based on the information, recommendations, research reports, analysis, quotes, etc. provided on the web site.

Shriram Insight Share Brokers Ltd shall not be liable for errors, omissions or typographical errors, disruption delay, interruption, failure, deletion or defect of/in the Service provided by it.

All Users of the Service in countries other than India understand that by using the Service, they may be violating the local laws in such countries. If the User chooses to access the Service from outside India, he shall be responsible for compliance with foreign and local laws.

EQUITIES | DERIVATIVES | COMMODITIES | DP SERVICES | MUTUAL FUNDS | RESEARCH

SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : helpdesk@shriraminsight.com | www.shriraminsight.com |