

## Index Chart

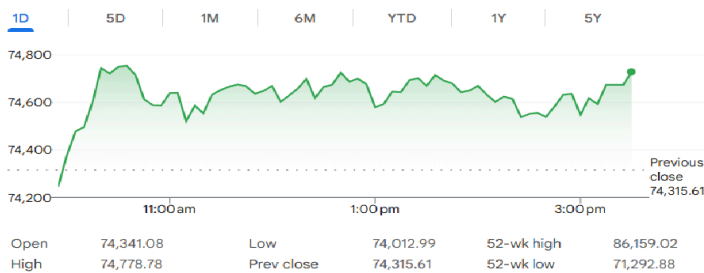
### NIFTY 50

23,146.15 ↑ 0.65% +148.80



### BSE SENSEX

74,729.27 ↑ 0.56% +413.66



(Source: [Bloomberg](#))

## Indian Markets

| Indices        | Close    | Previous | Change(%) |
|----------------|----------|----------|-----------|
| NIFTY 50       | 23146.15 | 22997.35 | 0.65%     |
| S&P BSE SENSEX | 74729.27 | 74315.61 | 0.56%     |
| NIFTY MID100   | 59129.75 | 59197.25 | -0.11%    |
| NIFTY SML100   | 19129.80 | 19131.70 | -0.01%    |

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

## Market Wrap Up

- The key equity benchmarks ended with significant gains, extending their winning streak to a second consecutive session, driven by buying interest in heavyweight stocks. Investors remained focused on September-quarter earnings. The Nifty settled near 23,150 mark.
- The S&P BSE Sensex jumped 413.66 points or 0.56% to 74,729.27. The Nifty 50 index added 148.80 points or 0.65% to 23,146.15. Over the past two consecutive trading sessions, the Sensex and Nifty rallied 2.68% and 2.31%, respectively.
- The Nifty MidCap 150 index shed 0.09%, while the Nifty SmallCap 250 index rose 0.06%.
- Among the sectoral indices, the Nifty IT index (up 3.92%), the Nifty Media index (up 1.92%) and the Nifty Metal index (up 0.95%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Consumer Durables index (down 0.61%), the Nifty Oil & Gas index (down 0.45%) and the Nifty Realty index (down 0.33%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **October** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **16** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **BHARTIARTL, ICICIBANK, HDFCBANK, INFY**.
- Short** position build up for the **October** series has been witnessed in **RELIANCE, LT, SBIN**.
- Unwinding** position for the **October** series has been witnessed in **BHEL, TATAPOWER, CGPOWER**.

(Source: Capitaline F&O)

## Sectoral Indices

| Indices       | Close    | Previous | Change(%) |
|---------------|----------|----------|-----------|
| NIFTY BANK    | 55844.00 | 55810.50 | 0.06%     |
| NIFTY AUTO    | 25768.50 | 25576.40 | 0.75%     |
| NIFTY FMCG    | 44616.15 | 44791.65 | -0.39%    |
| NIFTY IT      | 31924.10 | 30719.80 | 3.92%     |
| NIFTY METAL   | 12133.20 | 12018.50 | 0.95%     |
| NIFTY PHARMA  | 25781.65 | 25817.80 | -0.14%    |
| NIFTY REALTY  | 825.95   | 828.70   | -0.33%    |
| BSE CG        | 73532.23 | 73381.29 | 0.21%     |
| BSE CD        | 57505.19 | 57865.52 | -0.62%    |
| BSE Oil & GAS | 24668.67 | 24764.96 | -0.39%    |
| BSE POWER     | 7060.01  | 7029.24  | 0.44%     |

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

## Asia Pacific Markets

| Indices        | Close    | Previous | Change (%) |
|----------------|----------|----------|------------|
| NIKKEI225      | 65324.29 | 64425.95 | 1.39%      |
| HANG SENG      | 24186.83 | 24062.72 | 0.52%      |
| STRAITS TIMES  | 5415.53  | 5403.50  | 0.22%      |
| SHANGHAI       | 3716.28  | 3707.48  | 0.24%      |
| KOSPI          | 5668.05  | 5554.22  | 2.05%      |
| JAKARTA        | 5185.10  | 5863.78  | -11.57%    |
| TAIWAN         | 47111.26 | 46969.87 | 0.30%      |
| KLSE COMPOSITE | 1607.76  | 1623.70  | -0.98%     |
| ALL ORDINARIES | 8940.40  | 8840.40  | 1.13%      |

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

| Market   | Current   | Previous  |
|----------|-----------|-----------|
| NSE Cash | 122601.09 | 119050.64 |
| NSE F&O  | 167353.31 | 153146.01 |

(Source: [NSE](#))

## FII Activities (Crores)

| ACTIVITIES | Cash    |
|------------|---------|
| NET BUY    | 1165.92 |
| NET SELL   | -       |

(Source: [NSE](#))

## Corporate News

- **Wipro** reported a 4.5% sequential decline in consolidated net profit to Rs 3,200.6 crore for the second quarter of FY27, revenue from operations rose 1.1% quarter-on-quarter to Rs 24,752.7 crore.
- **Tech Mahindra** reported 32% year-on-year rise in net profit at Rs 1,586 crore for the quarter ended September 30, 2026. Consolidated revenue came in at Rs. 16,180 crores growing 15.6% YOY and 3% sequentially.
- **Persistent Systems** posted consolidated net profit declined 25.4% YoY and 27.2% QoQ to Rs 351.5 crore from Rs 471.5 crore. Revenue increased 30.3% YoY and 8.4% QoQ to Rs 4,663.9 crore in Q2 FY27.
- **HDFC Life Insurance Company** reported a 12.7% year-on-year increase in profit after tax (PAT) to Rs 1,119 crore for the first half of FY27. Total premium income rose 16% to Rs 39,569 crore in the six months ended September 30, 2026, compared with Rs 34,162 crore in the year-ago period.
- **Crompton Greaves Consumer Electricals** posted consolidated net profit rose 67.68% to Rs 119.34 crore in the quarter ended September 2026 as against Rs 71.17 crore during the previous quarter ended September 2025. Sales rose 18.15% to Rs 2263.29 crore in the quarter ended September 2026 as against Rs 1915.57 crore during the previous quarter ended September 2025.
- **Mahindra EPC Irrigation** reported a 418.6% YoY increase in consolidated net profit to Rs 2.23 crore in Q2 FY27. The company had reported a net loss of Rs 2.14 crore in Q1 FY27. Revenue from operations increased 46.53% YoY and 34.14% QoQ to Rs 72.65 crore in Q2 FY27.
- **Federal Bank** posted consolidated net profit rose 51.08% to Rs 1498.65 crore in the quarter ended September 2026 as against Rs 991.94 crore during the previous quarter ended September 2025. Total Operating Income rose 16.17% to Rs 8382.84 crore in the quarter ended September 2026 as against Rs 7216.18 crore during the previous quarter ended September 2025.
- **YES Bank's** Rs. 8,415-crore AT1 bond write-off, carried out during its 2020 reconstruction, has returned to the spotlight after the Supreme Court upheld a ruling

## Top Gainers

| SCRIP NAME | Close   | Previous | Change (%) |
|------------|---------|----------|------------|
| TECHM      | 1790.00 | 1650.00  | 8.48%      |
| TCS        | 2465.00 | 2350.00  | 4.89%      |
| INFY       | 1161.20 | 1110.00  | 4.61%      |
| BHARTIARTL | 1905.00 | 1854.00  | 2.75%      |
| M&M        | 2920.90 | 2861.70  | 2.07%      |

(Source: [Moneycontrol](#))

## Top Losers

| SCRIP NAME | Close   | Previous | Change (%) |
|------------|---------|----------|------------|
| INDIGO     | 4686.90 | 4778.30  | -1.91%     |
| BSE        | 3363.00 | 3428.00  | -1.90%     |
| MAXHEALTH  | 846.00  | 858.00   | -1.40%     |
| TATACONSUM | 978.90  | 991.45   | -1.27%     |
| JIOFIN     | 216.25  | 219.01   | -1.26%     |

(Source: [Moneycontrol](#))

- **Tata Chemicals** said a three-member tribunal of the Mumbai Centre for International Arbitration (MCIA) has unanimously rejected a Rs. 908-crore claim filed against it by Allied Silica Limited (ASL) and its promoter, Manmohan Singh Jain.

quashing the decision. The verdict could have implications for the lender's capital position, earnings and bondholders, with the eventual financial impact depending on how the ruling is implemented. The development comes as YES Bank continues its recovery and Japan's SMBC holds a 24.9% stake, making the outcome significant for the bank, its investors and its future financial position.

- **Jindal Steel** commissioned a 12.5 million tonne cargo terminal in Odisha's Paradip as part of its larger Rs. 3,400 crore investment project. The project was established through its subsidiary Jindal Paradip Port Ltd (JPPL). The company said the terminal would allow long term access to the port, adding that operations have begun ahead of schedule. Both phases of the terminal operations are progressing simultaneously.
- **Reliance Industries** stated that it welcomes competition, including Starlink, in the satellite communications sector. The company emphasized the need for all players to comply with Indian laws and regulations. Reliance noted that its satellite services are also awaiting necessary approvals. Elon Musk raised concerns about competition being hindered by oligarchs in India. The communications ministry reaffirmed the requirement for security compliance prior to spectrum assignment.

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

## Global News

- U.S. initial jobless claims ticked up to 199,000 in the week ended October 10th, an increase of 1,000 from the previous week's revised level of 198,000. Continuing claims fell by 4,000 to 1,710,000, remaining relatively close to the more-than-three-year low reached two weeks prior.
- U.S. producer prices soared by 1.3% from the previous month in September of 2026. The core PPI surged by 0.7% from the previous month in September of 2026 and accelerated from a 0.2% increase in the previous month. The headline PPI rose 6.3% annually, the most since December of 2022.
- U.S. retail sales increased 0.8% month-over-month in September 2026, following an upwardly revised 1.3% rise in August. Core retail sales rose by 0.9% month-over-month in September 2026, following a 1.4% increase in August.
- U.S. business inventories rose by 0.4% in August after climbing by an upwardly revised 0.9% in July.
- Eurozone annual inflation rate accelerated for a third consecutive month to 3.8% in September 2026, compared to 3.2% in August. Annual core inflation went up to 2.5% from 2.4%. Compared to August, the CPI increased 0.6%.
- Eurozone posted a trade deficit of EUR 16.1 billion in August of 2026, swinging from a EUR 502 million surplus in the previous year.

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

## Economic News

- Crude Oil traded at US\$ 97.79/bbl (IST 17:00).
- INR strengthened to Rs. 94.97 from Rs. 95.06 against each US\$ resulting in daily change of 0.09%.
- India's current account deficit narrowed to \$5.2 billion in August, compared to \$6.1 billion a year earlier. The capital account surplus increased substantially to \$50.6 billion, influenced by non-resident deposits of \$83 billion. The balance of payments showed a surplus of \$45.4 billion, contrasting with a deficit of \$5.6 billion in the previous year. External commercial borrowing saw a net outflow of \$22.4 billion during this time.
- India's balance of payments showed a surplus of \$45.4 billion in August, despite a current account deficit. Net transfers, which include remittances, increased to \$12.8 billion compared to the previous year. The capital account saw inflows of \$50.6 billion, significantly higher than last year's \$0.5 billion. Central bank measures to attract capital inflows have resulted in substantial foreign-exchange deposits.
- India and Canada have signed commercial agreements aimed at strengthening trade relations and enhancing economic cooperation. Minister of International Trade Maninder Sidhu emphasized collaboration opportunities in various sectors like artificial intelligence and digital innovation. The proposed Comprehensive Economic Partnership Agreement seeks to be concluded by the end of 2026. Current bilateral trade is projected to increase significantly following these agreements.
- In the fiscal year 2026-27, India's economy is expected to see growth ranging from 7.1 to 7.3 percent, fueled by a recovery

in private investments coupled with enhanced business dynamics. For the past ten years, strong household consumption and substantial public infrastructure investments have driven growth. Nonetheless, uncertainties stemming from geopolitical issues and energy price fluctuations pose potential threats to this forecast.

- India's Digital Public Infrastructure has been recognized as one of the top ten effective reforms globally. This infrastructure, particularly Aadhaar and the Unified Payments Interface, supports financial inclusion and reduces transaction costs. It facilitates greater integration of micro, small, and medium enterprises into the formal economy. Institutional coordination and interoperability have played crucial roles in its success and development.

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

## Forthcoming Events

### Board Meetings as on 17/10/2026

|                                 |                   |
|---------------------------------|-------------------|
| HDFC Bank Limited               | Financial Results |
| ICICI Bank Limited              | Financial Results |
| Axis Bank Limited               | Financial Results |
| Bajaj Healthcare Limited        | Financial Results |
| Central Bank of India           | Financial Results |
| IDBI Bank Limited               | Financial Results |
| Kross Limited                   | Financial Results |
| Le Travenues Technology Limited | Financial Results |
| Punjab & Sind Bank              | Financial Results |
| Rossari Biotech Limited         | Financial Results |
| TGB Banquets And Hotels Limited | Financial Results |
| The India Cements Limited       | Financial Results |
| Yes Bank Limited                | Financial Results |

### Board Meetings as on 19/10/2026

|                                 |                            |
|---------------------------------|----------------------------|
| UltraTech Cement Limited        | Financial Results          |
| L&T Technology Services Limited | Financial Results/Dividend |
| Bajaj Finance Limited           | Financial Results          |
| Hindustan Zinc Limited          | Financial Results          |
| Piramal Finance Limited         | Financial Results          |
| SML Mahindra Limited            | Financial Results          |
| Union Bank of India             | Financial Results          |
| A-One Steels India Limited      | Financial Results          |
| Delta Corp Limited              | Financial Results          |
| Gallantt Ispat Limited          | Financial Results          |
| HFCL Limited                    | Financial Results          |

|                                                    |                   |
|----------------------------------------------------|-------------------|
| Indian Renewable Energy Development Agency Limited | Financial Results |
| Jaiprakash Power Ventures Limited                  | Financial Results |
| Just Dial Limited                                  | Financial Results |
| NELCO Limited                                      | Financial Results |
| Sobha Limited                                      | Financial Results |
| Tatva Chintan Pharma Chem Limited                  | Financial Results |
| Varmora Granito Limited                            | Financial Results |
| Waaree Renewable Technologies Limited              | Financial Results |

(Source: NSE)

### Corporate Actions as on 19/10/2026

|                             |                                    |
|-----------------------------|------------------------------------|
| Jattashankar Industries Ltd | Stock Split From Rs.10/- to Rs.1/- |
|-----------------------------|------------------------------------|

(Source: NSE)

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