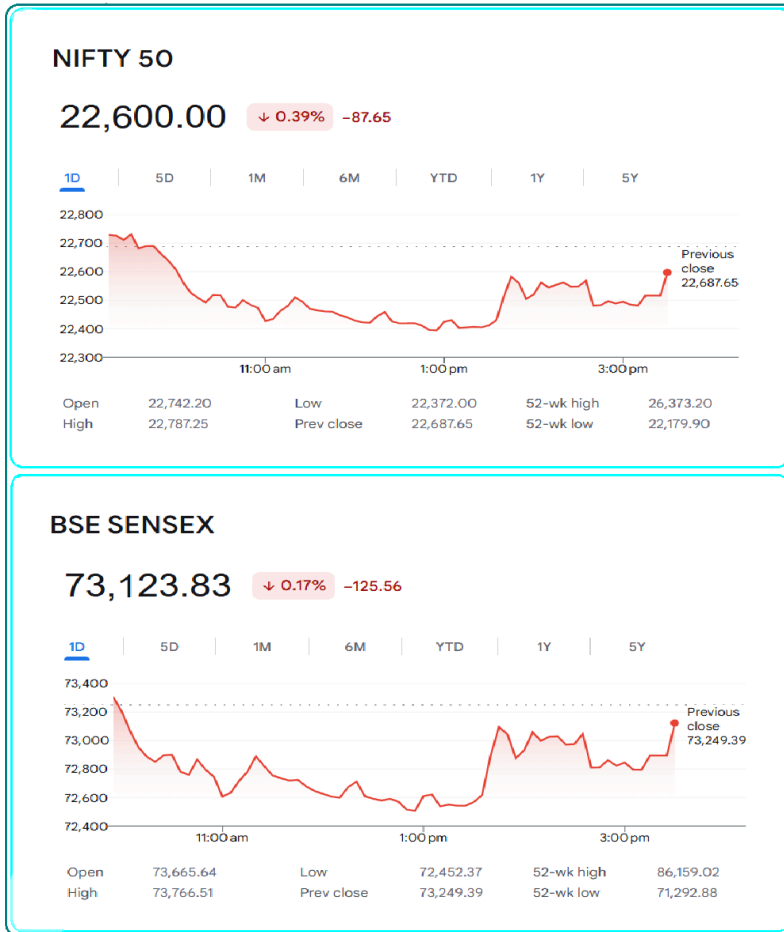


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22600.00	22687.65	-0.39%
S&P BSE SENSEX	73123.83	73249.39	-0.17%
NIFTY MID100	55800.65	57063.95	-2.21%
NIFTY SML100	17739.45	18275.90	-2.94%

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

Market Wrap Up

- The key equity benchmarks ended with moderate losses, extending their losing streak to a fourth consecutive session, weighed down by elevated Brent crude oil prices and persistent selling by foreign institutional investors (FIIs). The broader market also witnessed significant losses, reflecting widespread selling pressure. The Nifty settled at the 22,600 level.
- The S&P BSE Sensex declined 125.56 points or 0.17% to 72,123.83. The Nifty 50 index lost 87.65 points or 0.39% to 22,600. In the fourth consecutive trading session, the Sensex and Nifty declined 3.49% and 2.36%, respectively.
- The BSE 150 MidCap Index declined 2.10% and the BSE 250 SmallCap Index fell 2.68%.
- Among the sectoral indices, the Nifty IT index (down 0.27%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (down 2.71%), the Nifty Consumer Durables index (down 2.63%) and the Nifty Realty index (down 2.38%) 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 **40142** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **TCS, MARUTI, GRASIM**.
- Short** position build up for the **November** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54287.35	54925.70	-1.16%
NIFTY AUTO	24862.30	25011.50	-0.60%
NIFTY FMCG	42680.70	43105.45	-0.99%
NIFTY IT	31995.50	32081.25	-0.27%
NIFTY METAL	11478.20	11798.35	-2.71%
NIFTY PHARMA	25329.45	25596.65	-1.04%
NIFTY REALTY	784.35	803.45	-2.38%
BSE CG	67988.64	69740.27	-2.51%
BSE CD	54822.86	55798.09	-1.75%
BSE Oil & GAS	24259.47	24443.34	-0.75%
BSE POWER	6611.61	6754.20	-2.11%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	62693.16	62907.84	-0.34%
HANG SENG	23093.37	22934.68	0.69%
STRAITS TIMES	5422.16	5415.14	0.13%
SHANGHAI	3690.48	3658.03	0.89%
KOSPI	5550.30	5533.77	0.30%
JAKARTA	5439.26	5387.90	0.95%
TAIWAN	CLOSED	46041.43	-
KLSE COMPOSITE	1611.56	1608.14	0.21%
ALL ORDINARIES	8905.80	8917.10	-0.13%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	123123.89	108102.47
NSE F&O	454225.23	370502.40

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	887.65
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Colgate-Palmolive (India)** reported a 4.2% year-on-year (YoY) rise in net profit at Rs 342 crore in the September quarter, compared to Rs 328 crore for the same period last year. Revenue from operations rose 12.2% YoY to Rs 1,705.7 crore in Q2 FY27 from Rs 1,520 crore posted in the year-ago period.
- **Hindustan Petroleum Corp** reported a decline of 6% in its consolidated net profit for the second quarter of financial year 2026-27 at Rs 3,625.22 crore against Rs 3,859 crore in the corresponding quarter of FY26. Revenue rose by 26% to Rs 1.38 lakh crore in Q2FY27 against Rs 1.09 lakh crore in Q2FY26.
- **Swiggy** reported that its net loss narrowed 15.6% year-on-year (YoY) to Rs 922 crore in the second quarter (Q2) of financial year 2026-27 (FY27) from Rs 1,092 crore in the same period a year ago. Revenue rose 36% YoY to Rs 7,571 crore in Q2, up from Rs 5,561 crore a year ago. It had reported a revenue of Rs 6,812 crore in the previous quarter.
- **Sterlite Technologies** posted consolidated net profit rose 12825.00% to Rs 517.00 crore in the quarter ended September 2026 as against Rs 4.00 crore during the previous quarter ended September 2025. Sales rose 144.58% to Rs 2529.00 crore in the quarter ended September 2026 as against Rs 1034.00 crore during the previous quarter ended September 2025.
- **Force Motors** has partnered with Rosmerta Auto Recycling to help customers scrap end-of-life vehicles at the latter's authorised facility in the National Capital Region. The collaboration will cover documentation, depollution, dismantling and material recovery, including steel and aluminium recycling, while providing vehicle owners with a defined route for responsibly retiring ageing vehicles.
- **Oil India Ltd** has discovered natural gas in the previously unexplored Matsyapuri formation in the Krishna-Godavari Basin. The company said its Godavari-1 appraisal well, drilled in the shallow offshore KG Basin, encountered hydrocarbons at a depth of 2,024-2,027 metres.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ETERNAL	317.40	304.45	4.25%
APOLLOHOSP	7730.00	7604.50	1.65%
ONGC	227.50	225.00	1.11%
ASIANPAINT	2307.00	2284.80	0.97%
TCS	2530.00	2506.90	0.92%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	865.00	900.90	-3.98%
ADANIENT	2477.00	2550.00	-2.86%
JSWSTEEL	1185.50	1220.00	-2.83%
JIOFIN	205.03	210.80	-2.74%
ADANIPORTS	1702.70	1750.00	-2.70%

(Source: [Moneycontrol](#))

- **HPCL** has refinanced about Rs 50,000 crore of debt at its Rajasthan refinery, cutting borrowing costs by 105 basis points and targeting annual interest savings of Rs 1,000 crore through broader financial restructuring.
- **Cipla** said a routine US Food and Drug Administration (USFDA) inspection at its wholly owned subsidiary InvaGen Pharmaceuticals' manufacturing facility in Hauppauge, Long Island, New York.
- **KEC International** has secured new orders of Rs. 1,006 crore across various businesses: Transmission & Distribution (T&D): The business has secured orders for T&D projects: 400 kV Transmission Line in Oman, Supply of towers, hardware and poles in the Americas. Civil: The business has secured a repeat order for the construction of a Multispeciality Hospital from a renowned healthcare player in Eastern India. Cables & Conductors: The business has secured various orders in India and the overseas market.

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

Global News

- U.S. initial jobless claims fell to 194,000 in the week ended October 17th, a decrease of 6,000 from the previous week's revised level of 200,000. Continuing claims rose by 25,000 to 1.728 million in the week ended October 10.
- U.S. Conference Board leading economic index was unchanged in September after edging down by 0.1% in August.
- U.K. private sector continued to expand in October, with the flash Composite PMI Output Index rising to 53.1 from 52 in September. The manufacturing PMI rose to 52.8 in October 2026, up from 51.9 in September while the services PMI rose to 53.1 in October 2026 from 52.1 in September.
- U.K. GfK Consumer Confidence Index plunged 11 points to -24 in October 2026 from -13 in September.
- Eurozone S&P Global Composite PMI fell to 51.9 in October 2026, down from September's three-and-a-half-year high of 53.1. The manufacturing PMI edged down to 52.4 in October 2026, from 52.9 in September while the services PMI fell to 51.7 in October 2026 from 53.0 in the previous month.
- Eurozone consumer confidence fell further to -17.9 in October 2026 from -16.5 in September.
- Germany S&P Global Flash Germany Composite PMI fell to 52.8 in October 2026 from 53.8 in September. The manufacturing PMI rose to 54.2 in October 2026 from 53.9 in September while the services PMI fell to 51.7 in October 2026 from 52.9 in September.

- France's S&P Global Composite PMI fell to 48.4 in October 2026 from 51.1 in September. The manufacturing PMI fell to 49.3 in October 2026 from 50.6 in September while the services PMI fell to 48.4 in October 2026 from 51.2 in September.
- Japan's annual inflation rate accelerated to 2.1% in September 2026 from 1.9% in the previous two months. Core inflation climbed to 2.1% from 1.7% in August. On a monthly basis, consumer prices were flat, after rising 0.1% in August.
- Japan's S&P Global Composite PMI Business Activity Index held steady at 52.3 in October 2026, unchanged from September's final reading. The manufacturing PMI declined to 53.3 in October 2026 from 54.1 in September while the services PMI Business Activity Index rose to 52.0 in October 2026 from a final reading of 51.3 in the previous month.

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

Economic News

- Crude Oil traded at US\$ 100.88/bbl (IST 17:00).
- INR weakened to Rs. 94.94 from Rs. 94.83 against each US\$ resulting in daily change of 0.12%.
- India's HSBC Composite PMI rose to 56.7 in October 2026 from a final 55.9 in the prior month. The manufacturing PMI edged down to 54.9 in October 2026 from 55.1 in the previous month while the services PMI increased to 56.2 in October 2026 from 55.2 in September.
- India is expanding its domestic tunnel boring machine (TBM) manufacturing capabilities as work progresses on the 125-km Rishikesh-Karnaprayag railway line through the Himalayas. Railway Minister Ashwini Vaishnaw said India now manufactures 8-metre and 15-metre TBMs and plans to produce machines exceeding 16 metres, amid fresh Chinese restrictions on the technology.
- The Centre, last month, red flagged to states how delays in land acquisition, green clearances, state permissions and utility shifting are seriously impacting the pace of national linear infrastructure projects besides inflicting heavy cost overruns. The concerns were shared with states ahead of the Sixth National Conference of Chief Secretaries, which will deliberate on 'Accelerating Linear Infrastructure projects'.
- Starting November 1, the government plans to simplify GST registration for small e-commerce sellers. These reforms intend to reduce compliance burdens and facilitate faster refund processes. New measures will streamline registration by allowing sellers to declare e-commerce warehouses as their Principal Place of Business. Automated systems will issue refunds without officer intervention to improve operational efficiency. A minimum threshold for issuing show-cause notices will also be introduced to lower litigation.
- India is focusing on connectivity initiatives such as the International North-South Transport Corridor and the IMEC. Geopolitical tensions have challenged India's ambitions to establish reliable connectivity with Europe. In contrast, the China-Europe freight network significantly expands trade routes across Eurasia. The expansion provides multiple routes and helps mitigate disruptions in maritime transport. A shift in India-China relations may further enhance India's connectivity options with Eurasian markets.
- India's copper demand rose to 2,100 kilotonnes in FY'26, reflecting a 12% increase from the previous year. This growth was primarily driven by strong performance in the infrastructure, automotive, and construction sectors. The infrastructure sector experienced a notable 29% year-on-year increase, contributing significantly to domestic

consumption. In contrast, the automotive sector rebounded with a 14% rise following previous declines.

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

Forthcoming Events

Board Meetings as on 24/10/2026

Kotak Mahindra Bank Limited	Financial Results
AU Small Finance Bank Limited	Financial Results
IDFC First Bank Limited	Financial Results
JK Cement Limited	Financial Results
3P Land Holdings Limited	Financial Results
Apollo Micro Systems Limited	Financial Results
Bharat Coking Coal Limited	Financial Results
Castrol India Limited	Financial Results
German Green Steel and Power Limited	Financial Results
Kajaria Ceramics Limited	Financial Results/Dividend
Lumax Auto Technologies Limited	Financial Results
Netweb Technologies India Limited	Financial Results
SBFC Finance Limited	Financial Results
Seshasayee Paper and Boards Limited	Financial Results

Board Meetings as on 25/10/2026

Bharat Coking Coal Limited	Financial Results
Railtel Corporation Of India Limited	Financial Results/Dividend

Board Meetings as on 26/10/2026

ITC Hotels Limited	Financial Results
TATA CONSUMER PRODUCTS LIMITED	Financial Results
Aavas Financiers Limited	Financial Results
AceVector Limited	Financial Results
Aditya Birla Real Estate Limited	Financial Results
Aegis Logistics Limited	Financial Results
Aegis Vopak Terminals Limited	Financial Results
Aequus Limited	Financial Results
APL Apollo Tubes Limited	Financial Results
Astec LifeSciences Limited	Financial Results
Ather Energy Limited	Financial Results

Bank of Maharashtra	Financial Results
Brigade Hotel Ventures Limited	Financial Results
Dalmia Bharat Limited	Financial Results/Dividend
DCM Shriram Limited	Financial Results/Dividend
Deepa Jewellers Limited	Financial Results
Dhanlaxmi Bank Limited	Financial Results
Eris Lifesciences Limited	Financial Results
Five-Star Business Finance Limited	Financial Results
Genus Power Infrastructures Limited	Buyback
Indian Overseas Bank	Financial Results
JBM Auto Limited	Financial Results
Kfin Technologies Limited	Financial Results
LEAP India Limited	Financial Results
Lumax Industries Limited	Financial Results
Macpower CNC Machines Limited	Financial Results
Mankind Pharma Limited	Financial Results
Music Broadcast Limited	Financial Results
Nazara Technologies Limited	Financial Results
New Delhi Television Limited	Financial Results/Fund Raising
One 97 Communications Limited	Financial Results
Paramount Communications Limited	Financial Results
REC Limited	Financial Results/Dividend
Shanthi Gears Limited	Financial Results
Sona BLW Precision Forgings Limited	Financial Results
SRIT India Limited	Financial Results
Sumitomo Chemical India Limited	Financial Results
Sunteck Realty Limited	Financial Results
Supreme Industries Limited	Financial Results/Dividend
Surana Solar Limited	Financial Results
Tamilnad Mercantile Bank Limited	Financial Results
Venus Remedies Limited	Financial Results
WeWork India Management Limited	Financial Results

(Source: NSE)

Corporate Actions as on 26/10/2026

Hexaware Technologies Limited	Interim Dividend - Rs 9.50 Per Share
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(Source: NSE)

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