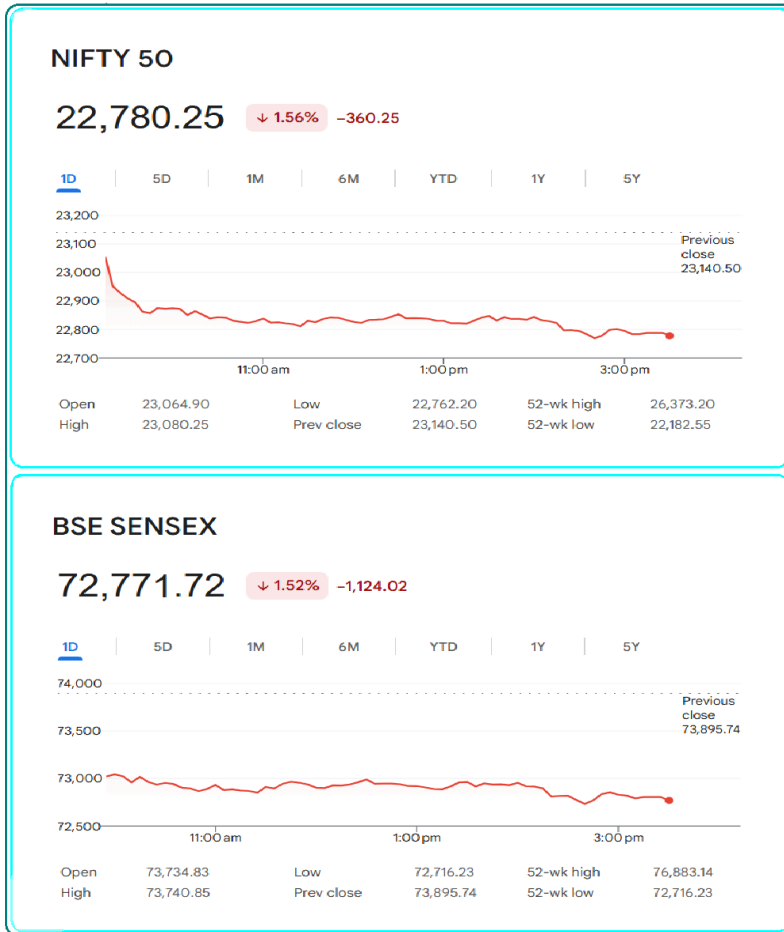


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22780.25	23140.50	-1.56%
S&P BSE SENSEX	72771.72	73895.74	-1.52%
NIFTY MID100	59914.20	60906.00	-1.63%
NIFTY SML100	19351.10	19715.25	-1.85%

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

Market Wrap Up

- The key equity benchmarks ended with major cuts amid a broad-based sell-off triggered by weak global cues, a surge in crude oil prices above the \$100-per-barrel mark, rising global bond yields and pressure on the rupee. Weakness in global technology stocks, amid concerns over the reliability and safety of artificial intelligence (AI) agents, further dampened investor sentiment. The Nifty settled below the 22,800 level. All the sectoral indices on the NSE were ended in red with PSU Bank, realty and oil & gas shares led the decline.
- The S&P BSE Sensex tanked 1,124 points or 1.52% to 72,771.72. The Nifty 50 index dropped 360.25 points or 1.56% to 22,780.25. In the past trading session, Nifty50 jumped 0.34% while Sensex rose 0.43%. The BSE 150 MidCap Index and the BSE 250 SmallCap Index declined 1.62% each.
- Among the sectoral indices, the Nifty Private Bank Index (down 1.51%), the Nifty FMCG index (down 0.47%) and the Nifty Consumer Durables index (down 0.30%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty PSUBank index (down 3.24%), Nifty Realty index (down 2.12%) and the Nifty Metal Index (down 1.78%) the 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 **48979** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **INFY, FEDERALBNK, VOLTAS**.
- Short** position build up for the **October** series has been witnessed in **RELIANCE, BHEL, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54471.65	55580.40	-1.99%
NIFTY AUTO	26525.05	26967.90	-1.64%
NIFTY FMCG	45264.35	45941.30	-1.47%
NIFTY IT	28086.50	28160.90	-0.26%
NIFTY METAL	12854.40	13087.15	-1.78%
NIFTY PHARMA	26761.65	27003.00	-0.89%
NIFTY REALTY	850.90	869.35	-2.12%
BSE CG	74441.95	75958.84	-2.00%
BSE CD	60650.78	61053.01	-0.66%
BSE Oil & GAS	25059.42	25510.59	-1.77%
BSE POWER	7168.35	7336.96	-2.30%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	65877.62	66364.20	-0.73%
HANG SENG	24642.51	24510.09	0.54%
STRAITS TIMES	5729.02	5711.12	0.31%
SHANGHAI	3823.62	3888.37	-1.67%
KOSPI	6889.74	7080.92	-2.70%
JAKARTA	6147.86	6241.89	-1.51%
TAIWAN	CLOSED	CLOSED	-
KLSE COMPOSITE	1670.02	1671.62	-0.10%
ALL ORDINARIES	8850.70	8845.60	0.06%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	100535.20	102762.28
NSE F&O	388268.67	398462.55

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	5353.22

(Source: [NSE](#))

Corporate News

- **TVS Motor Company** has launched the TVS NTORQ 150, Nepal's 1st Hyper Sport Scooter. Powered by a 149.7cc race-tuned engine and inspired by stealth aircraft design, the TVS scooter brings together high performance, sporty aesthetics and cutting-edge technology to cater to a new generation of riders.
- **Zydu Lifesciences** announced that the USFDA conducted onsite inspection of pharmacovigilance and post marketing surveillance system at the company's office based in New Jersey, USA. The inspection was conducted from 22 September to 25 September 2026. The inspection closed with NIL observations.
- **Kalpataru Projects International** has received a letter of award (LoA) for the engineering, procurement and construction (EPC) of a gas pipeline project in the United Arab Emirates (UAE).
- **JSW Energy** said its wholly owned subsidiary JSW Thermal Energy has entered into a contract with Toshiba JSW Power Systems to procure two 800 MW steam turbine generators for Phase-II of the Salboni Thermal Power Project in West Bengal.
- **IndusInd Bank** has introduced a new banking vertical specifically for Global Capability Centres within India. This initiative aims to address the growing banking needs of these centres as they expand. The vertical integrates corporate and employee banking into a unified relationship. It also includes foreign-currency account services to meet cross-border transaction requirements. IndusInd Bank's approach reflects the evolving landscape of the GCC ecosystem in the country.
- **Petronet LNG Ltd** has proposed to seek shareholders' approval for paying commissions to directors from FY27 to FY31. This proposal is for a maximum of 1% of annual profits according to the Companies Act, 2013. The company reported a net profit in FY26, with commissioner payments remaining below statutory limits. Akshay Kumar Singh, the CEO, received a commission of Rs 26.5 lakh each in FY26.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
DRREDDY	1221.00	1201.00	1.67%
INFY	1003.20	1000.20	0.30%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TMPV	281.75	290.45	-3.00%
ADANIENT	2831.10	2916.50	-2.93%
JIOFIN	220.50	227.00	-2.86%
POWERGRID	261.85	269.50	-2.84%
LT	3766.40	3876.20	-2.83%

(Source: [Moneycontrol](#))

- **ITC** is enhancing its Aashirvaad dairy brand in Eastern India to leverage growing market demand. The company aims to convert households from loose to packaged dairy products, especially curd and paneer. ITC's current operations cover Bihar, West Bengal, and Jharkhand with several processing plants.
- **Dabur India** has obtained approval from the National Company Law Tribunal for merging with Sesa Care. This merger aims to strengthen Dabur's existing hair care portfolio and explore new growth opportunities. Previously, Dabur acquired a majority stake in Sesa Care, and the board approved the merger scheme.
- **Sun Pharma** has signed an exclusive agreement with LIB Therapeutics for Lerodalcibep, a cholesterol-lowering medication. This deal covers all markets globally except for the United States and China. Lerodalcibep, a once-monthly PCSK9 inhibitor, will be marketed under the name Lyrokaul in Europe.
- **Paras Defence and Space Technologies** has received an order from the Defence Research and Development Organisation (DRDO), Ministry of Defence, valued at approximately Rs 26.59 crore (including taxes), wherein the Company will be the Lead System Integrator and will also provide the complete design, analysis, fabrication, manufacturing and assembly of the Optics and Opto-Mechanical Unit for a Hyperspectral Mission. The complete payload shall qualify as a Space-Borne System having potential utilisation for Earth Observation.
- **Lupin** said that it has received tentative approval from the United States Food and Drug Administration (U.S. FDA) for its new drug application for Apixaban oral suspension.
- **Power Finance Corporation** announced that its wholly owned subsidiary, PFC Consulting has incorporated a special purpose vehicle, Malegaon Power Transmission.
- **SAIL** has signed an MoU with BCCL for the joint development and operation of SAIL's Indikatta Ramnagore and BCCL's East of Damagoria (Kalyaneshwari) coal blocks in West Bengal.
- **Rashtriya Chemicals and Fertilizers** said that it has awarded a purchase order worth Rs 797 crore to Larsen & Toubro for revamp of its ammonia plant for reduction in specific energy consumption.

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

Global News

- China's industrial profits rose 15.7% year-on-year to CNY 5.27 trillion in the first eight months of 2026, slowing from a 17.6% gain in the January-July period. In August alone, industrial profits grew 4.2% from the prior year, sharply easing from an 11.2% rise in July.
- U.S. durable goods were largely flat month-over-month at \$338.6 billion in August 2026, following two consecutive monthly increases. Core durable goods orders went up by 0.3%, after a 0.7% increase in July.
- U.S. University of Michigan's consumer sentiment index improved slightly to 48.1 in September 2026 from a preliminary reading of 47.8.

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

Economic News

- Crude Oil traded at US\$ 92.48/bbl (IST 17:00).
- INR weakened to Rs. 95.99 from Rs. 95.83 against each US\$ resulting in daily change of 0.17%.
- India's industrial production growth accelerated to 8.0% year-on-year in August 2026, up from an upwardly revised 7.4% in July.
- The rabi season in India is expected to encounter difficulties due to the El Nino weather pattern. Agriculture Secretary Atish Chandra highlighted the challenges faced during the kharif season in rainfed regions. Crop diversification is needed for self-sufficiency despite research and income hurdles. Infrastructure modernization is crucial to prevent farm losses and ensure market access. A robust digital agriculture system is essential for accurate data utilization in crop production planning.
- The power ministry on Friday said secretary Pankaj Agarwal met Bernard Fontana, Chairman and CEO of Electricite de France (EDF), where discussions centred around the deployment of the French utility's EPR technology in the country, apart from evolving regulatory framework for the nuclear power sector, and cooperation on pumped hydro storage projects.
- India and Australia are working towards a comprehensive economic cooperation agreement and a Bilateral Investment Treaty to deepen trade and investment ties, Commerce Minister Piyush Goyal said. The countries are also expanding cooperation in critical minerals and education, while addressing cross-border taxation and compliance issues affecting businesses and service providers.
- India will keep taxation outside the framework of bilateral investment treaties, with a revised model BIT expected to be considered by the Cabinet soon. The Finance Ministry has circulated a note, while negotiations with four-five countries are underway. Foreign investors will also have to exhaust local remedies before seeking arbitration.
- The Centre has cut FY27 gross market borrowing to Rs 15.99 lakh crore from Rs 17.2 lakh crore budgeted, seeking to limit

pressure on bond yields amid global uncertainty. It will borrow Rs 7.86 lakh crore in the second half, including Rs 15,000 crore through sovereign green bonds, while extending debt maturities.

- The UAE is set to invest an additional \$25 billion in India, strengthening energy cooperation between the nations. India and the UAE are exploring strategic petroleum reserves and subsea pipelines for gas transportation and storage. Bilateral trade between the countries has doubled to \$100 billion, with a target of \$200 billion by 2032. Local currency settlement in trade is on the rise, currently in double digits.
- Car prices have risen about 3% in the past year, but faster growth in household disposable incomes has kept cars affordable after GST 2.0 cuts, Tata Motors Passenger Vehicles MD Shailesh Chandra said. Passenger vehicle demand has surged, particularly in the 18% GST category.
- Telecom regulator Trai on Friday launched Digital Connectivity Rating (DCR) platform, which will allow consumers to check the digital connectivity ratings of properties before buying or leasing them. Consumers can search for rated properties by name, certificate ID or location, compare them and verify their digitally signed rating certificates through a QR code, the regulator said in a statement.

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

Forthcoming Events

Board Meetings as on 29/09/2026

Punjab & Sind Bank	Fund Raising
Transport Corporation of India Limited	Buyback
Vipul Limited	Financial Results

(Source: NSE)

Corporate Actions as on 29/09/2026

Leo Dryfruits & Spices Trading Ltd	Final Dividend - Rs. - 0.50
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(Source: NSE)

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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 |