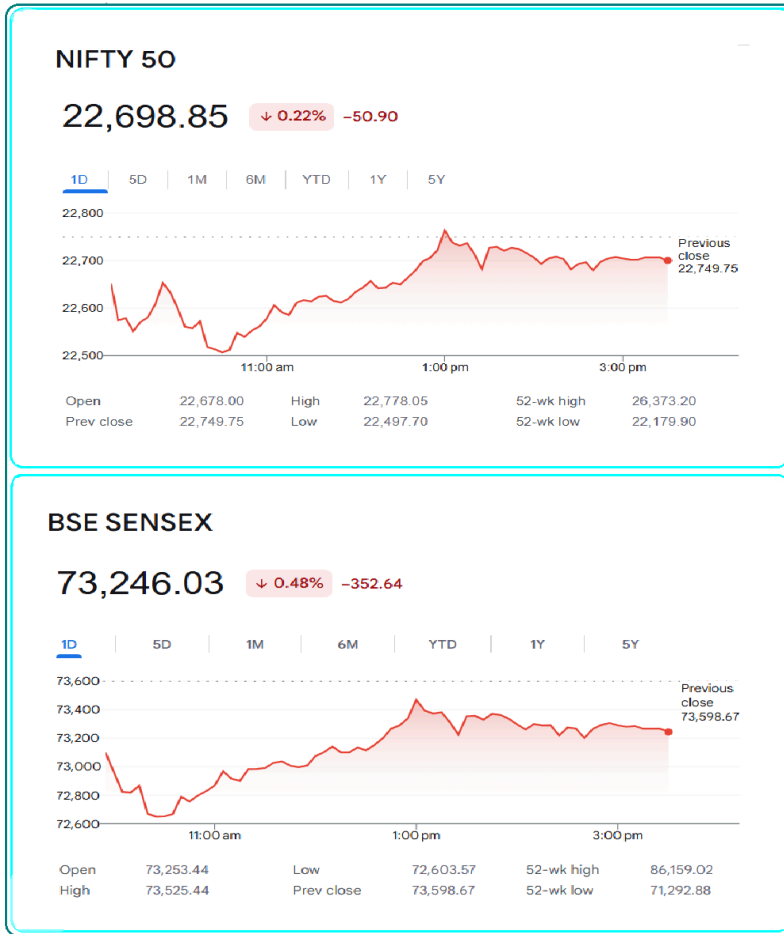


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22698.85	22749.75	-0.22%
S&P BSE SENSEX	73246.03	73598.67	-0.48%
NIFTY MID100	57274.70	57029.90	0.43%
NIFTY SML100	18634.90	18468.70	0.90%

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

Market Wrap Up

- The key equity benchmarks ended with minor cuts, extending their losing streak for the second consecutive trading session, weighed down by concerns over elevated crude oil prices, weakness in heavyweight stocks and mixed corporate earnings. Investor sentiment remained cautious ahead of the US Federal Reserve's monetary policy decision later today, with market participants awaiting clarity on the central bank's interest rate outlook and its implications for global financial markets. The Nifty settled below the 22,700 mark. The S&P BSE Sensex declined 352.64 points or 0.48% to 73,246.03. The Nifty 50 index fell 50.90 points or 0.22% to 22,698.85. In the two consecutive trading sessions, the Sensex and the Nifty dropped 0.49% and 0.24%, respectively. The BSE 150 MidCap Index rose 0.51% and the BSE 250 SmallCap Index added 0.37%.
- Among the sectoral indices, the Nifty Auto index (up 1.45%), the Nifty Consumer Durables index (up 1.41%) and the Nifty Media index (up 1.38%) outperformed the Nifty 50 index. Meanwhile, the Nifty Oil & Gas index (down 2.27%), the Nifty IT index (down 1.98%) and the Nifty Realty index (down 0.89%) 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 **11397** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **LT, SBIN, HDFCBANK**.
- Short** position build up for the **November** series has been witnessed in **RELIANCE, BHARTIARTL, INFY**.
- Unwinding** position for the **August** series has been witnessed in **ICICIBANK, LTM**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54267.40	53974.90	0.54%
NIFTY AUTO	25707.35	25340.80	1.45%
NIFTY FMCG	42878.35	43118.20	-0.56%
NIFTY IT	31553.40	32189.45	-1.98%
NIFTY METAL	11769.35	11806.70	-0.32%
NIFTY PHARMA	26541.35	26267.25	1.04%
NIFTY REALTY	797.85	805.05	-0.89%
BSE CG	70018.58	69906.93	0.16%
BSE CD	55390.00	55008.61	0.69%
BSE Oil & GAS	24261.97	24778.81	-2.09%
BSE POWER	6819.81	6812.58	0.11%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	63954.19	63268.37	1.08%
HANG SENG	23094.83	23041.32	0.23%
STRAITS TIMES	5397.91	5397.03	0.02%
SHANGHAI	3681.47	3648.30	0.91%
KOSPI	6012.44	5638.34	6.63%
JAKARTA	5282.31	5266.13	0.31%
TAIWAN	47035.58	46096.23	2.04%
KLSE COMPOSITE	1613.87	1611.85	0.13%
ALL ORDINARIES	8971.40	8968.80	0.03%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	128963.99	119872.12
NSE F&O	135413.13	351086.68

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	871.83
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Larsen & Toubro** reported a 32.5% year-on-year rise in consolidated net profit for the September quarter of the financial year 2026-27. Consolidated net profit at Rs 5,202.10 crore for the quarter ended September 2026. The company had posted a consolidated net profit of Rs 3,926.09 crore in the year-ago period. Revenue of Rs 78,750 crore for the reporting quarter, registering a year-on-year growth of 16%.
- **Hindustan Unilever Ltd** reported 6% increase in net profit at Rs 2,844 crore for the quarter ended September 30, 2026. The company beat Street estimates of Rs 2,777 crore. Revenue rose 6% to Rs 17,543 crore, with a 7% rise. The company has recommended the interim dividend of Rs 19 per equity Share
- **Vedanta Ltd** reported a 17% sequential increase in net profit to Rs 6,202 crore for the quarter ended September 2026 (Q2 FY27), compared with Rs 5,294 crore in the preceding quarter. Revenue rose 8.9% quarter-on-quarter to Rs 26,356 crore, against Rs 24,205 crore in the June quarter.
- **Adani Enterprises** reported 55% decline in net profit at Rs 1,492 crore for the quarter ended September 30, 2026. The company reported net profit of Rs 3,304 crore in the year-ago period. Revenue came at Rs 37,216 crore in Q2FY27 as against Rs 21,249 crore in the year-ago period.
- **Adani Ports and Special Economic Zone Ltd** reported an 18% year-on-year increase in consolidated net profit to Rs 3,682 crore for the second quarter of FY27, compared with Rs 3,120 crore in the corresponding period last year. Revenue rose 24% to Rs 11,340 crore from Rs 9,167 crore a year earlier.
- **TVS Motor Company Ltd** reported 52% jump in net profit at Rs 1,377 crore for the quarter ended September 30, 2026. The company reported net profit of Rs 904 crore in the year-ago period. Revenue rose 44% to Rs 17,103 crore in Q2FY27 as compared to Rs 11,905 crore in Q2FY26.
- **United Breweries** reported a 190% year-on-year increase in standalone net profit to Rs 136 crore in Q2 FY27. Standalone net sales rose 24% year on year to Rs 2,536 crore from Rs 2,051 crore.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
APOLLOHOSP	8137.00	7791.50	4.43%
LT	3801.30	3665.10	3.72%
TRENT	2913.90	2820.60	3.31%
SBILIFE	1666.70	1633.00	2.06%
INDIGO	4690.00	4596.50	2.03%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	1123.15	1163.00	-3.43%
RELIANCE	1158.00	1196.20	-3.19%
ONGC	224.89	229.85	-2.16%
TECHM	1776.60	1811.40	-1.92%
BHARTIARTL	1948.10	1978.80	-1.55%

(Source: [Moneycontrol](#))

- **Jyoti Structures** received notification of award (NoA) worth Rs 648.91 crore from Power Grid Corporation of India for the ±800 kV HVDC transmission line project under package TL05.

- **GAIL India** is investing 6 billion rupees to build a heating unit at its Ratnagiri LNG terminal. This facility is expected to be completed by June 2027, enabling full operational capacity. Currently, the terminal is running at about 50% capacity without an operational heating unit. A captive power plant is also under construction to generate heat for this LNG facility.
- **Cipla** has partnered with Qilu Pharmaceutical to commercialize a biosimilar of Keytruda, which is a major cancer treatment. The patent for this drug is expected to expire around 2029, allowing for potential market entry. Cipla anticipates capturing a significant share of this lucrative market segment after the launch. Additionally, the company reported a 35% decline in consolidated net profit in the September quarter.
- **Info Edge (India)** has approved the proposal to divest its entire holding (i.e. 14.18%) held in Medcords Healthcare Solutions (Medcords) on fully converted & diluted basis, through its wholly-owned subsidiary, Startup Investments (Holding) (SIHL). A provision for impairment of full amount against said investment was booked in FY 2023-24. Post this divestment, Medcords will cease to be joint venture of the company.

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

Global News

- U.S. durable goods orders increased 1.8% month-on-month in September 2026, following an upwardly revised 0.1% gain in August. Core durable goods orders increased 0.5%, following a 0.3% gain in August.
- U.S. house price index rose 0.3% from the previous month in August 2026. Year-on-year, house prices rose 2.4%, easing from 2.5% in the previous month.
- U.S. building permits fell 0.4% month-on-month in September 2026 to a seasonally adjusted annual rate of 1.398 million, slightly below the preliminary estimate of 1.4 million.
- U.S. new home sales fell 0.6% month-on-month to a seasonally adjusted annual rate of 676,000 in September 2026, down from a revised eight-month high of 680,000 in August.
- U.S. Conference Board said its consumer confidence index jumped to 91.7 in October from an upwardly revised 84.2 in September.
- Germany's GfK Consumer Climate Indicator fell to -30.8 heading into November 2026 from -30.6 in October.
- Australia's annual inflation rate accelerated to 4.3% in September 2026 from 4.0% in August. On a monthly basis, the CPI

increased by 0.8%, accelerating from a 0.4% gain in August.

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

Economic News

- Crude Oil traded at US\$ 101.72/bbl (IST 17:00).
- INR weakened to Rs. 95.23 from Rs. 95.12 against each US\$ resulting in daily change of 0.14%.
- India's industrial production growth slowed to 6.7% year-on-year in September 2026, down from a downwardly revised 7.8% in August.
- India and Mexico have signed the Terms of Reference to initiate negotiations on a Preferential Trade Agreement. This agreement aims to enhance bilateral trade and investment opportunities between the two countries. Key negotiating areas include market access, customs procedures, and trade facilitation measures. Both delegations discussed organizing a Mexican business mission to India in early 2027.
- Indian banks have seen their excess funds drop significantly as the Reserve Bank of India maintains liquidity tightness. This monetary policy is aimed at curbing speculation against the rupee, which has reached critical levels. The central bank has provided limited liquidity support and capped assistance at 1.5 trillion rupees. Consequently, overnight borrowing rates have risen close to the top of the monetary policy range.
- India's soybean imports significantly increased to 1.1 million metric tons in 2025/26 compared to the previous year. Rising domestic prices prompted Indian mills to enhance their overseas purchases of soybeans. The majority of these imports originated from Niger, which became the largest exporter to India.
- The Central Board of Indirect Taxes and Customs has issued clarifications regarding GST registration requirements for businesses. Companies will no longer need to provide Udyam certificates or face rejections due to unpaid bills. Registration applications must be processed within seven working days with Aadhaar authentication. Tax demands must include clear justifications and cannot be arbitrary. These changes aim to simplify compliance and reduce disputes in tax administration.
- Indian petrol demand is projected to peak by the year 2035 as electric vehicles become more prevalent. The chairman of Indian Oil Corp highlighted that ethanol blending and more gas vehicles will also contribute. In contrast, the consumption of diesel and jet fuel is expected to grow due to industrial expansion. Additionally, demand for certain heavy fuel grades like petcoke will rise significantly.

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

Forthcoming Events

Board Meetings as on 29/10/2026

InterGlobe Aviation Limited	Financial Results
Asian Paints Limited	Financial Results/Dividend
Coal India Limited	Financial Results/Dividend
Ambuja Cements Limited	Financial Results
Godrej Consumer Products Limited	Financial Results/Dividend
Alivus Life Sciences Limited	Financial Results
Apar Industries Limited	Financial Results
Asset Reconstruction Company (India) Limited	Financial Results
Banaras Beads Limited	Financial Results
Bliss GVS Pharma Limited	Financial Results
Blue Star Limited	Financial Results
Borosil Limited	Financial Results
Brigade Enterprises Limited	Financial Results
Capital Small Finance Bank Limited	Financial Results/Fund Raising
CARE Ratings Limited	Financial Results/Dividend
Computer Age Management Services Limited	Financial Results/Dividend
DCW Limited	Financial Results
Deepak Nitrite Limited	Financial Results
EPACK Durable Limited	Financial Results
Equitas Small Finance Bank Limited	Financial Results
ESAF Small Finance Bank Limited	Financial Results
Fino Payments Bank Limited	Financial Results
Firstsource Solutions Limited	Financial Results
Garware Technical Fibres Limited	Financial Results
Greaves Cotton Limited	Financial Results
Grindwell Norton Limited	Financial Results
HeidelbergCement India Limited	Financial Results
Hubtown Limited	Financial Results
ICRA Limited	Financial Results
Indegene Limited	Financial Results
Indian Energy Exchange Limited	Financial Results
IndoStar Capital Finance Limited	Financial Results
Ind-Swift Laboratories Limited	Financial Results
IRB InvIT Fund	Financial Results
JSW Holdings Limited	Financial Results
Kalpataru Limited	Financial Results

Krishna Defence and Allied Industries Limited	Financial Results/Dividend
KRN Heat Exchanger and Refrigeration Limited	Financial Results
Laurus Labs Limited	Financial Results/Dividend
Man Infraconstruction Limited	Financial Results
Menon Bearings Limited	Financial Results
Milky Mist Dairy Food Limited	Financial Results
Motilal Oswal Financial Services Limited	Financial Results/Fund Raising
Mtar Technologies Limited	Financial Results
NIIT Learning Systems Limited	Financial Results
Nilkamal Limited	Financial Results
NOCIL Limited	Financial Results
P N Gadgil Jewellers Limited	Financial Results
Paradeep Phosphates Limited	Financial Results
Paras Defence and Space Technologies Limited	Financial Results
Pine Labs Limited	Financial Results
Praj Industries Limited	Financial Results
Restaurant Brands Asia Limited	Financial Results
RPG Life Sciences Limited	Financial Results
Sanofi India Limited	Financial Results/Dividend
Senores Pharmaceuticals Limited	Financial Results
Shadowfax Technologies Limited	Financial Results
Shaily Engineering Plastics Limited	Financial Results
Steamhouse India Limited	Financial Results
Strides Pharma Science Limited	Financial Results
Suraj Limited	Financial Results
Suryoday Small Finance Bank Limited	Financial Results
Suzlon Energy Limited	Financial Results
Symphony Limited	Financial Results/Dividend
Thyrocare Technologies Limited	Financial Results
Timken India Limited	Financial Results
TITAGARH RAIL SYSTEMS LIMITED	Financial Results
Transwarranty Finance Limited	Financial Results/Fund Raising
Trent Limited	Financial Results
Vedanta Oil and Gas Limited	Financial Results
Vedanta Power Limited	Financial Results
V-Guard Industries Limited	Financial Results
Voltamp Transformers Limited	Financial Results
Welspun Corp Limited	Financial Results
Wheels India Limited	Financial Results

(Source: NSE)

Corporate Actions as on 29/10/2026

Shriram Finance Limited	Interim Dividend - Rs 6.50 Per Share
Central Mine Planning & Design Institute Limited	Interim Dividend - Rs 1.05 Per Share
Crisil Limited	Interim Dividend - Rs 17 Per Share
Kajaria Ceramics Limited	Interim Dividend - Rs 12 Per Share
Ksolves India Limited	Interim Dividend - Re 1 Per Share

(Source: NSE)

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