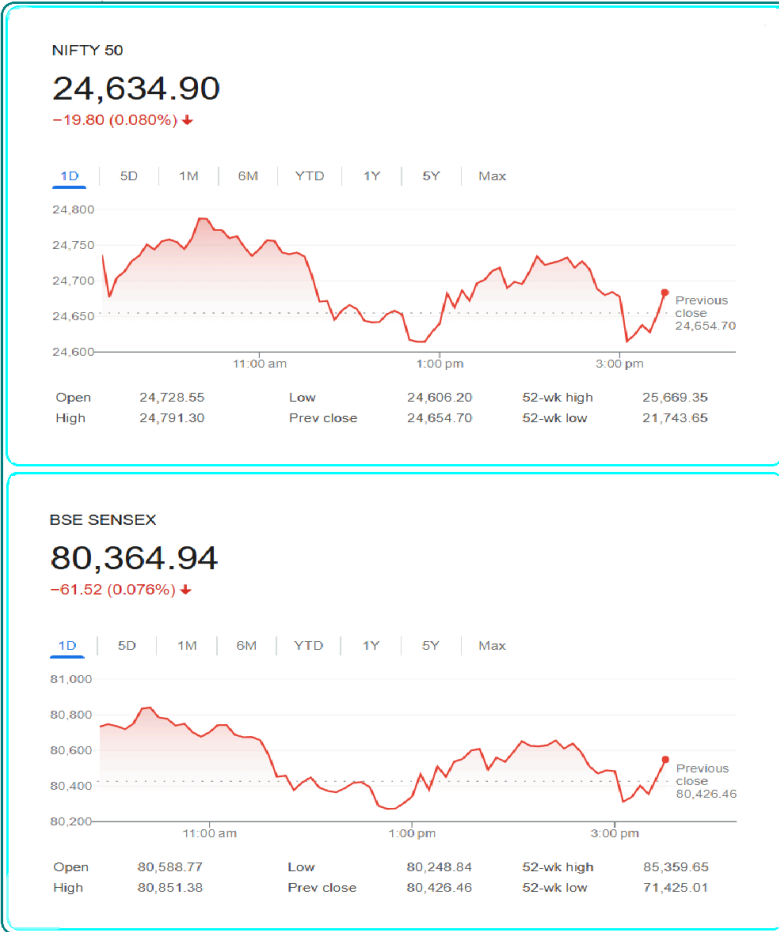


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24634.90	24654.70	-0.08%
S&P BSE SENSEX	80364.94	80426.46	-0.08%
NIFTY MID100	56533.15	56378.55	0.27%
NIFTY SML100	17548.65	17560.90	-0.07%

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

Market Wrap Up

- The headline equity indices ended with minor losses today, marking the seventh consecutive trading session of decline, as investors remained cautious ahead of the RBI's Monetary Policy Committee (MPC) meeting. The Nifty settled below the 24,650 mark.
- The S&P BSE Sensex, declined 61.52 points or 0.08% to 80,364.94. The Nifty 50 index lost 19.80 points or 0.08% to 24,634.90. In seven consecutive trading sessions, the Sensex plummeted 3.19% and the Nifty tumbled 3.10%.
- The S&P BSE Mid-Cap index added 0.34% and the S&P BSE Small-Cap index shed 0.17%.
- Among the sectoral indices, the Nifty PSU Bank index (up 1.78%), the Nifty Oil & Gas index (up 1.35%) and the Nifty Realty index (up 0.88%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 0.85%), the Nifty Private Bank index (down 0.29%) and the Consumer Durables index (down 0.19%) 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 **57047** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **SBIN, HDFCBANK, TCS, M&M**.
- Short** position build up for the **November** series has been witnessed in **RELIANCE, LT, BHARTIARTL, ICICIBANK, INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54461.00	54389.35	0.13%
NIFTY AUTO	26436.55	26484.55	-0.18%
NIFTY FMCG	54945.80	54847.55	0.18%
NIFTY IT	33693.05	33702.00	-0.03%
NIFTY METAL	9923.10	9888.25	0.35%
NIFTY PHARMA	21475.30	21507.20	-0.15%
NIFTY REALTY	874.75	867.15	0.88%
BSE CG	68283.11	68345.94	-0.09%
BSE CD	58148.99	58118.83	0.05%
BSE Oil & GAS	26951.40	26433.05	1.96%
BSE POWER	6728.17	6697.54	0.46%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	45043.75	45354.99	-0.69%
HANG SENG	26622.88	26128.20	1.89%
STRAITS TIMES	4269.98	4265.98	0.09%
SHANGHAI	3862.53	3828.11	0.90%
KOSPI	3431.21	3386.05	1.33%
JAKARTA	8112.23	8099.33	0.16%
TAIWAN	CLOSED	25580.32	-
KLSE COMPOSITE	1610.95	1609.05	0.12%
ALL ORDINARIES	9148.50	9079.20	0.76%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	133255.38	97349.73
NSE F&O	427571.76	411159.62

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2831.59

(Source: [NSE](#))

Corporate News

- Larsen & Toubro** secured a USD 700 million Sustainability-Linked Trade Facility from Standard Chartered. This facility is tied to key performance indicators like greenhouse gas emissions and freshwater withdrawal, aligning with L&T's business operations and market standards. This follows their earlier issuance of India's first listed sustainability-linked bond.
- Tata Motors'** Jaguar Land Rover has sought £2 billion emergency funding after a cyberattack halted production. UK factories and global operations faced shutdowns. The UK government will guarantee a separate £1.5 billion loan. This aims to support suppliers and ensure liquidity. Production is expected to normalize by November. Financial impact could reach £3.5 billion.
- Tata Power** EV Charging Solutions has partnered with VE Commercial Vehicles to accelerate the adoption of electric commercial vehicles in India, particularly the Eicher Pro X range. This collaboration leverages Tata Power's extensive charging infrastructure and VECV's vehicle optimization to address critical challenges like range anxiety and infrastructure availability.
- Tata Communications** has been awarded a multi-crore project by the Ministry of Finance to deliver a comprehensive digital infrastructure for the Goods and Services Tax Appellate Tribunal (GSTAT) benches. This secure and scalable system, encompassing network, cloud, and security, will automate operations, enhance transparency, and streamline GSTAT's nationwide functions, aligning with the Digital India vision.
- Lupin** said that its subsidiary has entered into a pact with Amsterdam-headquartered VISUfarma BV for 100% acquisition at an enterprise value of 190 million euros.
- Wockhardt** said that The Lancet Regional Health Southeast Asia published results from the Phase 3 clinical study of Miquaf (nafithromycin).
- Alkem Laboratories** announced that it has entered into a business agreement with its wholly-owned unit Alkem Wellness. The company has agreed to transfer its trade generic business. This shall be effective from October 1, 2025.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INDUSINDBK	732.15	712.75	2.72%
TITAN	3401.20	3327.30	2.22%
ETERNAL	327.35	321.00	1.98%
WIPRO	240.20	235.75	1.89%
M&M	3455.00	3396.50	1.72%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
AXSIABNK	1132.20	1154.00	-1.89%
MARUTI	15984.00	16286.00	-1.85%
DRREDDY	1234.60	1253.10	-1.48%
LT	3688.40	3729.50	-1.10%
HDFCLIFE	757.60	764.40	-0.89%

(Source: [Moneycontrol](#))

- **Radico Khaitan** has launched Jamun SpicyMint under its much-loved Magic Moments 'Flavours of India' range.

- **Reliance Power** announced it has signed an agreement to sell its entire stake in five Indonesian coal entities to Biotruster (Singapore) Pte. Ltd. for \$12 million. The deal, executed on September 29, 2025, is expected to be completed by December 30, 2025. These subsidiaries contributed no income in the last financial year.

- **Oil India** has entered natural gas in its Vijayapuram-2 exploratory well in the Andaman Shallow Offshore Block. As per the company, preliminary testing confirmed inflow. Further studies are underway to assess the potential of this discovery.

- **Wheels India** said it entered into a technical agreement with SHPAC, a South Korean hydraulic cylinder manufacturer, for technology transfer in manufacturing.

- **Vascon Engineers** signed memorandum of understanding (MoU) with Adani Infra (India) to act as their execution partner under an early engagement model for five years.

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

Global News

- China's profits at industrial firms grew 0.9% yoy to CNY 4.69 trillion in the 1st eight months of 2025, rebounding from a 1.7% decline in the 1st seven months of the year. In August alone, profits surged 20.4% yoy, recovering sharply from a 1.5% drop in July, and marking the 1st monthly growth in four months.
- U.S. consumer sentiment index for September was downwardly revised to 55.1 from a preliminary ready of 55.4.
- Eurozone economic optimism index increased to 95.50 points in September from 95.30 points in August of 2025. The consumer confidence was at -14.9 in September 2025, up from -15.5 in August.

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

Economic News

- Crude Oil traded at US\$ 63.24/bbl (IST 17:00).
- INR weakened to Rs. 88.77 from Rs. 88.72 against each US\$ resulting in daily change of 0.06%.
- India's industrial output grew by 4% in August as against the growth of 4.3% in July.
- The Reserve Bank's Monetary Policy Committee commenced its meeting, with expectations largely pointing to a status quo on key interest rates. However, some experts foresee a 25 bps cut, driven by declining inflation and the need to stimulate growth amidst global uncertainties and US tariffs.
- EY raised India's FY26 GDP growth forecast to 6.7% from 6.5%, attributing the revision to GST 2.0 reforms. These changes are expected to boost domestic demand and ease household budgets by consolidating tax rates. Despite global headwinds, strategic investments and trade diversification efforts are crucial for sustaining this growth momentum.
- Moody's affirmed India's Baa3 rating with a stable outlook, citing improving fiscal metrics and resilient growth prospects. While fiscal weaknesses and high debt remain concerns, the agency expects limited near-term impact from US tariffs and policy shifts on India's economy. However, tariffs could hinder India's long-term export manufacturing ambitions.

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

Forthcoming Events

Board Meetings as on 30/09/2025

AGI Greenpac Limited

Fund Raising

(Source: NSE)

Corporate Actions as on 30/09/2025

Star Housing Finance Ltd

Right Issue of Equity Shares

(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 |