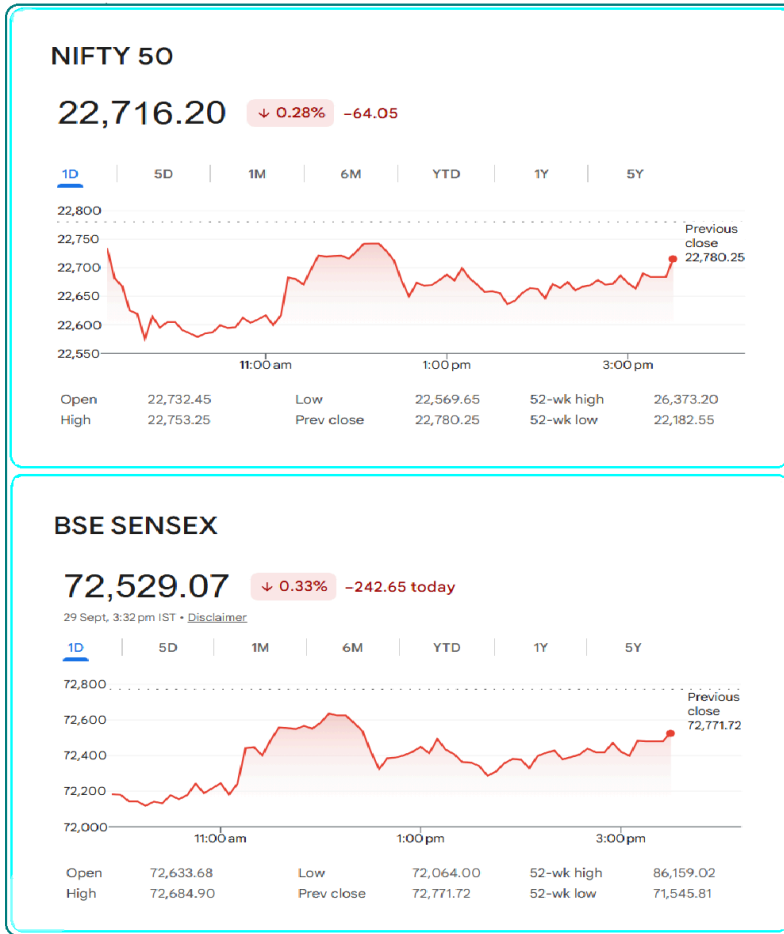


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22716.20	22780.25	-0.28%
S&P BSE SENSEX	72529.07	72771.72	-0.33%
NIFTY MID100	59319.40	59914.20	-0.99%
NIFTY SML100	19193.55	19351.10	-0.81%

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

Market Wrap Up

- The key equity benchmarks ended with modest cuts, extending their decline for the second straight session, as persistent selling pressure and weak global cues weighed on investor sentiment. Rising crude oil prices and elevated global bond yields remained key concerns for investors, while geopolitical uncertainty and the monthly expiry of derivatives contracts on the NSE added to market caution. The Nifty closed below the 22,750 mark.
- The S&P BSE Sensex tanked 242.65 points or 0.33% to 72,529.07. The Nifty 50 index tumbled 64.05 points or 0.28% to 22,716.20. In the past two trading sessions, the Sensex declined 1.85%, while the Nifty fell 1.83%.
- The BSE 150 MidCap Index declined 0.74% and the BSE 250 SmallCap Index fell 0.49%.
- Among the sectoral indices, the Nifty Consumer Durables index (down 2.71%), the Nifty Realty index (down 2%) and the Nifty IT index (down 1.48%) underperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (up 0.78%), the Nifty Pharma index (up 0.64%) and the Nifty Media index (up 0.11%) outperformed 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 **58509** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **BHARTIARTL**, **SBIN**, **ADANIPOWER**.
- Short** position build up for the **October** series has been witnessed in **RELIANCE**, **ICICIBANK**, **HDFCBANK**, **INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54259.95	54471.65	-0.39%
NIFTY AUTO	26173.35	26525.05	-1.33%
NIFTY FMCG	44790.30	45264.35	-1.05%
NIFTY IT	27670.00	28086.50	-1.48%
NIFTY METAL	12954.45	12854.40	0.78%
NIFTY PHARMA	26933.65	26761.65	0.64%
NIFTY REALTY	833.85	850.90	-2.00%
BSE CG	74345.20	74441.95	-0.13%
BSE CD	59453.97	60650.78	-1.97%
BSE Oil & GAS	24891.49	25059.42	-0.67%
BSE POWER	7168.04	7168.35	0.00%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	65481.27	65877.62	-0.60%
HANG SENG	24523.57	24642.51	-0.48%
STRAITS TIMES	5714.84	5729.02	-0.25%
SHANGHAI	3830.45	3823.62	0.18%
KOSPI	6870.81	6889.74	-0.27%
JAKARTA	6121.70	6147.86	-0.43%
TAIWAN	47631.96	48024.60	-0.82%
KLSE COMPOSITE	1643.96	1670.02	-1.56%
ALL ORDINARIES	8886.60	8850.70	0.41%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	161565.01	100535.20
NSE F&O	376129.45	388268.67

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	9980.22

(Source: [NSE](#))

Corporate News

- TATA.ev** has unveiled an exciting extension of its Battery-as-a-Service program across all electric vehicles. This innovative initiative is designed to enhance affordability by separating battery costs from the vehicle price, significantly reducing initial expenses. Customers can choose to purchase the vehicle outright or select the Battery-as-a-Service option, with monthly payments varying based on battery size and duration.
- 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.
- Vikram Solar** has secured a pivotal contract to deliver 400 MW of solar modules to an EPC player, initiating shipments in October 2026 for decentralized solar installations across Maharashtra. This contract underscores the company's commitment to innovation, buoyed by its cutting-edge N-Type TOPCon technology and robust manufacturing skills. As a prominent player in the photovoltaic sector, Vikram Solar's initiative emphasizes solar energy's role in supporting sustainable development for agricultural communities.
- Pine Labs** said that the company has extended its technology partnership with Woolworths Group for their gift card ecosystem through enhanced platform capabilities, deeper API integrations, and support for new digital stored-value experiences.
- NCC** announced that it has secured an order worth Rs 1,076.71 crore from the Rural Water Supply and Sanitation Department, Visakhapatnam, Government of Andhra Pradesh.
- Symbiotec Pharmed** announced the receipt of establishment inspection report (EIR) from the U.S. Food and Drug Administration (US FDA) for its manufacturing facility in Pithampur (SEZ), Madhya Pradesh.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ADANIENT	2972.90	2831.10	5.01%
ADANIPTS	1822.00	1743.70	4.49%
DRREDDY	1251.90	1221.00	2.53%
SUNPHARMA	1865.00	1838.00	1.47%
KOTAKBANK	406.00	401.55	1.11%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TITAN	4675.00	4819.50	-3.00%
WIPRO	156.79	161.56	-2.95%
HCLTECH	1222.00	1252.60	-2.44%
APOLLOHOSP	8659.00	8860.00	-2.27%
TECHM	1510.50	1542.20	-2.06%

(Source: [Moneycontrol](#))

- **Azad Engineering** announced the inauguration of two exclusive lean manufacturing facilities for GE Vernova's Gas Power business.
- **Transport Corporation of India** board has approved incorporation of wholly owned subsidiary in China in line with the company's strategy of expanding its international logistics network across key global trade corridors.
- **Clean Max Enviro Energy Solutions** and Nuvoco Vistas Corporation have partnered to advance renewable energy adoption in Rajasthan through a 46.4 MW wind-solar hybrid project.
- **Coal India** said that it has executed a non-binding memorandum of understanding (MoU) with Hindustan Urvarak & Rasayan (HURL) for exploring the development of a coal gasification based Urea Production at Sindri, Jharkhand.

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

Global News

- China recorded a current account surplus of \$193.7 billion in Q2 2026, revised down from the initial estimate of \$195.1 billion but up from \$184.3 billion in Q1.
- Eurozone Economic Sentiment Indicator fell to 97.9 in September 2026 from 98.4 in August. The consumer confidence in the Euro Area weakened to -16.5 in September 2026, from a six-month high of -15.5 in August.
- The Reserve Bank of Australia raised its cash rate target by 25 bps to 4.60% in a unanimous September 2026 decision.

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

Economic News

- Crude Oil traded at US\$ 91.92/bbl (IST 17:00).
- INR closed at Rs. 95.99.
- Prices of key pulses including chana, moong, tur and matar have risen sharply over the past month, with wholesale rates increasing up to 11%, according to IPGA data.
- Trade between India and the UAE settled in local currencies has reached double digits, Commerce and Industry Minister Piyush Goyal said Monday. Bilateral trade is also nearing pre-war levels and is expected to recover in coming months. Goyal said businesses are increasingly recognising the benefits of rupee-dirham settlements amid geopolitical disruptions.
- The net collections in small savings schemes are set to exceed the budgeted target of Rs 3.59 lakh crore for the current financial year 2026-27 by a fair margin, with inflows in the first four months of the fiscal year up 56% from a year earlier.

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

Forthcoming Events

Board Meetings as on 30/09/2026

GP Petroleums Limited	Fund Raising
Sakuma Exports Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 30/09/2026

Saraswati Saree Depot Limited	Interim Dividend - Rs 3 Per Share
Steel Authority of India Limited	Dividend - Rs 2.35 Per Share

(Source: NSE)

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