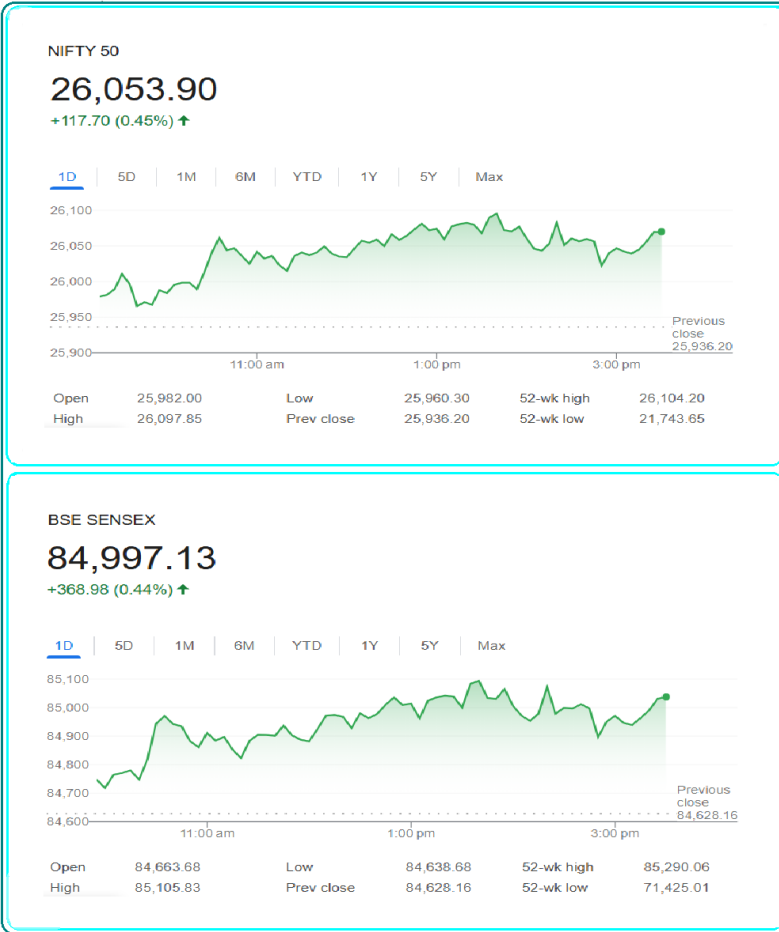


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	26053.90	25936.20	0.45%
S&P BSE SENSEX	84997.13	84628.16	0.44%
NIFTY MID100	60149.05	59765.35	0.64%
NIFTY SML100	18487.55	18407.60	0.43%

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

Market Wrap Up

- The headline equity benchmarks ended with modest gains today, supported by positive global cues and optimism ahead of the U.S. Federal Reserve's policy decision. The Nifty settled above the 26,050 mark.
- The S&P BSE Sensex, surged 368.97 points or 0.44% to 84,997.13. The Nifty 50 index added 117.70 points or 0.45% to 26,053.90.
- The S&P BSE Mid-Cap index added 0.68% and the S&P BSE Small-Cap index rose 0.56%. The market breadth was positive.
- Among the sectoral indices, the Nifty Oil & Gas index (up 2.12%), the Nifty Metal index (up 1.71%) and the Nifty Media index (up 1.63%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Auto index (down 0.73%), the Nifty PSU Bank index (up 0.02%) and the Nifty Private Bank index (up 0.14%) 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 **8025** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **RELIANCE**, **BHEL**, **BHARTIARTL**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- Short** position build up for the **November** series has been witnessed in **LT**, **BAJFINANCE**, **ETERNAL**.
- Unwinding** position for the **November** series has been witnessed in **TATATECH**, **INDUSTOWER**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	58385.25	58214.10	0.29%
NIFTY AUTO	26948.90	27148.35	-0.73%
NIFTY FMCG	56615.35	56110.05	0.90%
NIFTY IT	36090.10	35860.40	0.64%
NIFTY METAL	10777.50	10596.20	1.71%
NIFTY PHARMA	22430.70	22250.90	0.81%
NIFTY REALTY	950.50	944.60	0.62%
BSE CG	70021.69	69321.56	1.01%
BSE CD	61094.48	60600.85	0.81%
BSE Oil & GAS	28521.75	27812.59	2.55%
BSE POWER	7011.14	6825.52	2.72%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	51307.65	50219.18	2.17%
HANG SENG	CLOSED	26346.14	-
STRAITS TIMES	4440.21	4450.36	-0.23%
SHANGHAI	4016.33	3988.22	0.70%
KOSPI	4081.15	4010.41	1.76%
JAKARTA	8166.22	8092.63	0.91%
TAIWAN	28294.74	27949.11	1.24%
KLSE COMPOSITE	1611.54	1613.56	-0.13%
ALL ORDINARIES	9218.80	9295.80	-0.83%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	112298.42	116153.19
NSE F&O	169289.67	420911.05

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	10339.80
NET SELL	-

(Source: [NSE](#))

Corporate News

- **TVS Motor Company** reported a 36.74% increase in standalone net profit to Rs 906.09 crore on 29.01% jump in revenue from operations to Rs 11,905.43 crore in Q2 FY26 over Q2 FY25.
- **Adani Green Energy** reported a 111.2% surge in consolidated net profit to Rs 583 crore despite of 5.3% decline in net sales to Rs 2,824 crore in Q2 FY26 over Q2 FY25.
- **Mahindra & Mahindra Financial Services** posted standalone net profit jumped 54.08% to Rs 569.31 crore in Q2 FY26 as against Rs 369.47 crore reported in Q2 FY25. Total income increased by 14.37% year on year to Rs 4,489.24 crore in the quarter ended 30 September 2025.
- **DCM Shriram** posted consolidated net profit jumped 152.5% year-on-year to Rs 158.7 crore in Q2 FY26, compared with Rs 62.9 crore in Q2 FY25. Net sales increased 10.68% YoY to Rs 3,255.11 crore from Rs 2,940.95 crore in Q2 FY25.
- **Computer Age Management Services** posted consolidated net profit dropped 6.1% to Rs 11.94 crore despite of 3.2% increase in net sales to Rs 376.74 crore in Q2 FY26 over Q2 FY25.
- **Blue Dart Express** posted standalone net profit climbed 30.8% to Rs 79.50 crore on 7% increase in net sales to Rs 1,549.33 crore in Q2 FY26 over Q2 FY25.
- **Larsen & Toubro's** Power Transmission & Distribution division has secured significant grid infrastructure contracts in Saudi Arabia. These orders involve building a 380/33 kV gas-insulated substation and developing over 420 kilometers of 380 kV overhead transmission lines. This expansion will bolster Saudi Arabia's power infrastructure to support its renewable energy program. L&T classifies a large order as one that has a contract value of Rs 2,500-5,000 crore.
- **CESC's** subsidiary, Purvah Green Power, received a contract from the Solar Energy Corporation of India (SECI) for setting up a 300 MW solar power project with an Energy Storage System (ESS).

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ADANI PORTS	1461.50	1417.90	3.07%
ADANI ENT	2559.60	2494.40	2.61%
NTPC	347.50	339.15	2.46%
HCLTECH	1555.20	1522.10	2.17%
POWERGRID	294.35	288.25	2.12%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
DRREDDY	1250.90	1289.40	-2.99%
COALINDIA	381.70	391.40	-2.48%
M&M	3531.90	3579.10	-1.32%
ETERNAL	330.45	334.60	-1.24%
MARUTI	16138.00	16311.00	-1.06%

(Source: [Moneycontrol](#))

- Varun Beverages** is making significant moves, partnering with Carlsberg for alcoholic beverage distribution in Africa and establishing a new subsidiary in Kenya. This expansion into beer and other spirits diversifies their portfolio beyond soft drinks. Additionally, a new refrigeration joint venture in India will bolster their cold chain infrastructure, reflecting strong growth and investor confidence.
- Inox Solar** has signed an initial agreement with LONGi for a significant solar module supply. This partnership will bring up to 5 GW of solar modules to India over three years. The collaboration aims to enhance manufacturing excellence and ensure access to advanced solar technologies. Inox Solar is expanding its manufacturing facilities in Gujarat and Odisha.
- Alembic Pharmaceuticals** announced that it has received final approval from the US Food & Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) for Ticagrelor Tablets, 60 mg.
- Gujarat Pipavav Port** has signed a non-binding memorandum of understanding (MoU) with the Gujarat Maritime Board for future investments of Rs 17,000 crore at Pipavav Port.
- Bharat Rasayan** has proposed splitting the face value of each equity share from Rs 10 to Rs 5. It has also recommended a 1:1 bonus issue.
- Indian Oil** is set to partner with global trader Vitol in a new joint venture. This strategic move aims to expand Indian Oil's presence in international crude and fuel trading. The collaboration will leverage Vitol's global network and expertise.
- Indus Towers** is delaying dividends due to Vodafone Idea's AGR dues. The company welcomes clarity on this issue. Indus Towers plans to expand into Africa within six months. This expansion will focus on Nigeria, Uganda, and Zambia.

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

Global News

- The Central Bank of Chile left its benchmark interest rate unchanged at 4.75% in a unanimous decision during its October meeting.
- U.S. house price index rose by 0.4% in September from the previous month in August of 2025. From the previous year, home prices rose by 2.3%.
- U.S. Conference Board said its consumer confidence index dipped to 94.6 in October from an upwardly revised 95.6 in September.
- Australia's annual inflation rate jumped to 3.2% in Q3 2025 from 2.1% in Q2. The monthly Consumer Price Index (CPI) rose

3.5% yoy in September 2025, up from 3.0% in August.

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

Economic News

- Crude Oil traded at US\$ 60.42/bbl (IST 17:00).
- INR strengthened to Rs. 88.21 from Rs. 88.27 against each US\$ resulting in daily change of 0.07%.
- Prime Minister Narendra Modi announced the Cabinet's approval of nutrient-based subsidy rates for phosphatic and potassic fertilizers for the 2025-26 Rabi season. This decision, aimed at farmer welfare, includes increased subsidies for phosphorus and sulphur, ensuring affordable fertilizers and potentially boosting farmer incomes. Subsidy rates for nitrogen and potash remain unchanged.
- India's central bank has brought home 274 tonnes of gold since March 2023. The move to accelerated repatriation of gold started post the Russia- Ukraine war and the Taliban's takeover of Afghanistan.
- The Centre raised the subsidy on phosphorous (P) and sulphur (S) fertilisers for the ongoing 2025-26 rabi season, with a higher subsidy allocation of Rs 37,952 crore to provide relief to the farming community.
- India's toll collection is projected to surge past Rs 1.4 lakh crore in two years, fueled by ambitious plans for world-class road infrastructure. Minister Nitin Gadkari revealed a roadmap emphasizing safety, sustainability, and economic viability, including using segregated waste in road construction and promoting alternate fuel equipment. Strict action is promised against faulty road construction and maintenance.
- The Union cabinet has approved the terms for the eighth central pay commission. This commission will revise salaries and pensions for millions of central government employees and pensioners. Headed by Justice Ranjana Prakash Desai, it will submit its report within 18 months. Recommendations are expected to be implemented from January 1, 2026.

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

Forthcoming Events

Board Meetings as on 30/10/2025

ITC Limited	Financial Results
NTPC Limited	Financial Results/Dividend
Cipla Limited	Financial Results
Pidilite Industries Limited	Financial Results
Dabur India Limited	Financial Results/Dividend
Hyundai Motor India Limited	Financial Results
DLF Limited	Financial Results
Adani Power Limited	Financial Results
Aditya Birla Capital Limited	Financial Results
ASK Automotive Limited	Financial Results
Automotive Axles Limited	Financial Results
Automotive Stampings and Assemblies Limited	Financial Results
Banaras Beads Limited	Financial Results
Bandhan Bank Limited	Financial Results
Canara Bank	Financial Results
Carborundum Universal Limited	Financial Results
Dr. Agarwal's Health Care Limited	Financial Results
Exide Industries Limited	Financial Results
Gillette India Limited	Financial Results/Dividend
Gravita India Limited	Financial Results
Grindwell Norton Limited	Financial Results
IFB Industries Limited	Financial Results
IIFL Finance Limited	Financial Results
Indegene Limited	Financial Results
Indian Energy Exchange Limited	Financial Results
IndoStar Capital Finance Limited	Financial Results
Jain Irrigation Systems Limited	Financial Results
JBM Auto Limited	Financial Results
Lodha Developers Limited	Financial Results
LT Foods Limited	Financial Results
Manappuram Finance Limited	Financial Results/Dividend
Motilal Oswal Financial Services Limited	Financial Results
Mphasis Limited	Financial Results
Navin Fluorine International Limited	Financial Results/Dividend
Nippon Life India Asset Management Limited	Financial Results/Dividend
Paisalo Digital Limited	Fund Raising

Rajratan Global Wire Limited	Financial Results
Restaurant Brands Asia Limited	Financial Results
Sharda Cropchem Limited	Financial Results
Swiggy Limited	Financial Results
TD Power Systems Limited	Financial Results/Dividend
Union Bank of India	Financial Results
United Spirits Limited	Financial Results
Vedant Fashions Limited	Financial Results
Welspun Corp Limited	Financial Results
Xchanging Solutions Limited	Financial Results

(Source: NSE)

Corporate Actions as on 30/10/2025

Geekay Wires Limited	Face Value Split (Sub-Division) - From Rs 2/- Per Share To Re 1/- Per Share
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(Source: NSE)

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