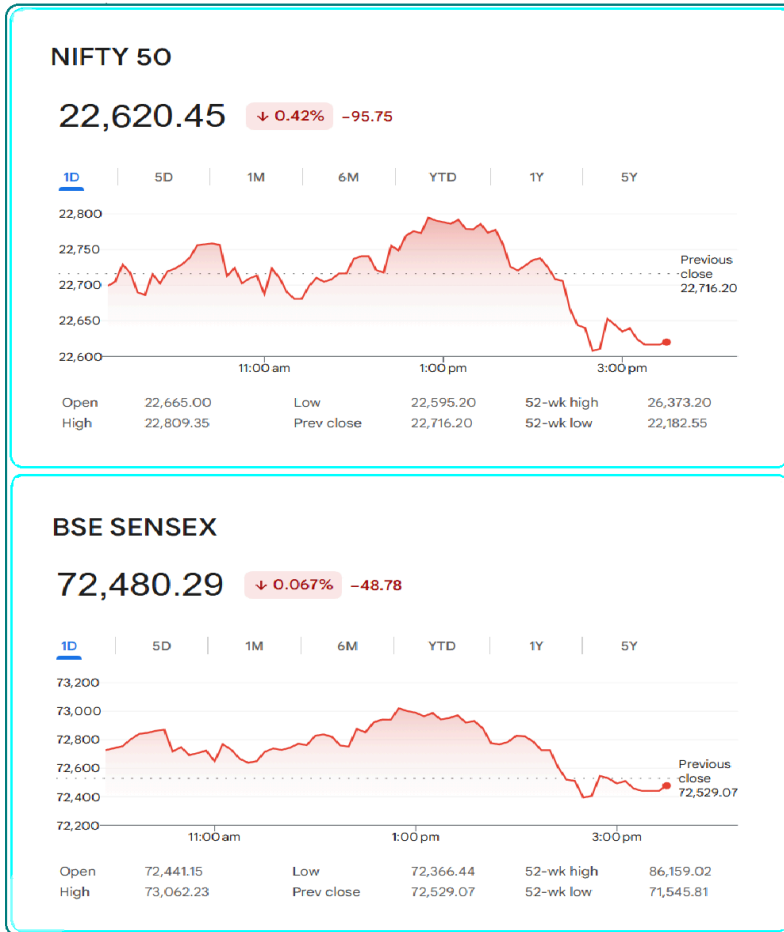


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	22620.45	22716.20	-0.42%
S&P BSE SENSEX	72480.29	72529.07	-0.07%
NIFTY MID100	59332.05	59319.40	0.02%
NIFTY SML100	19245.70	19193.55	0.27%

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

Market Wrap Up

- The key equity benchmarks ended with modest cuts, extending their decline for a third consecutive session, weighed down by a marginal rise in crude oil prices and continued selling by foreign institutional investors (FIIs). The Nifty settled below the 22,650 mark. Investors remained cautious ahead of the release of US inflation data. Market participants will also track movements in crude oil prices and bond yields, along with central bank decisions in response to incoming economic data.
- The S&P BSE Sensex declined 48.78 points or 0.07% to 72,480.29. The Nifty 50 index declined 95.75 points or 0.42% to 22,620.45. In the three consecutive trading sessions, the Sensex and Nifty fell 1.92% and 2.25%, respectively. The BSE 150 MidCap Index declined 0.17% and the BSE 250 SmallCap Index was unchanged.
- Among the sectoral indices, the Nifty Media index (up 2.74%), the Nifty Realty index (up 1.62%) and the Nifty Private Bank index (up 0.95%) outperformed the Nifty 50 index. Meanwhile, the Nifty Healthcare index (down 2.57%), the Nifty Pharma index (down 1.84%) and the Nifty Metal index (down 1.50%) 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 **16063** contracts at the end of the day.
- Long** position build up for the **October** series has been witnessed in **ICICIBANK**, **INFY**.
- Short** position build up for the **October** series has been witnessed in **RELIANCE**, **BHARTIARTL**, **SBIN**, **HDFCBANK**.
- Unwinding** position for the **October** series has been witnessed in **WIPRO**, **GRASIM**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54633.05	54259.95	0.69%
NIFTY AUTO	26293.95	26173.35	0.46%
NIFTY FMCG	44508.45	44790.30	-0.63%
NIFTY IT	27704.80	27670.00	0.13%
NIFTY METAL	12760.50	12954.45	-1.50%
NIFTY PHARMA	26438.00	26933.65	-1.84%
NIFTY REALTY	847.35	833.85	1.62%
BSE CG	74129.75	74345.20	-0.29%
BSE CD	58603.05	59453.97	-1.43%
BSE Oil & GAS	24894.35	24891.49	0.01%
BSE POWER	7180.57	7168.04	0.17%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	66753.72	65481.27	1.94%
HANG SENG	24613.27	24523.57	0.37%
STRAITS TIMES	5675.88	5714.84	-0.68%
SHANGHAI	3842.19	3830.45	0.31%
KOSPI	6838.04	6870.81	-0.48%
JAKARTA	6071.14	6121.70	-0.83%
TAIWAN	47940.13	47631.96	0.65%
KLSE COMPOSITE	1651.17	1643.96	0.44%
ALL ORDINARIES	8969.20	8886.60	0.93%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	126128.84	161565.01
NSE F&O	115621.93	376129.45

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	10148.41

(Source: [NSE](#))

Corporate News

- Larsen & Toubro Limited** has secured twin contracts from Dubai's Roads and Transport Authority for infrastructure development. The first contract involves a new road and associated works, enhancing connectivity in the area. The second contract includes improvements to Al Meydan Street and construction of a cycling track. Both projects are set for completion by the end of 2028 and will improve traffic flow.
- State Bank of India** officials are seeking clarity on handling accounts when an organization's registration is suspended. They highlighted risks for smaller entities that may lose access to funds upon missing renewal deadlines. The JPC is examining the implications of the FCRA Amendment Bill, focusing on accountability and regulations for banking procedures.
- Nuvoco Vistas Corp** has engaged in a partnership with Clean Max Enviro Energy Solutions for a renewable project. This initiative involves a 46.4 MW wind-solar hybrid energy facility located in Rajasthan. The project will include 20 MW of wind capacity and 26.4 MWdc of solar capacity, featuring a 2-MWh Battery Energy Storage System.
- Ceigall India** has received the Letter of Intent from Govt. of Bihar, Department of Mines and Geology for allotment/leasing of stone blocks in Nawada District, Lot-4, Bhadokhara, Block-D under Competitive Bidding through e-reverse auction.
- Coforge** announced the launch of CXNova, an AI-native customer experience (CX) platform designed to help enterprises deliver personalization, engagement, and continuous optimization across critical customer touchpoints. Built on a multi-agent architecture, CXNova enables organizations to transform disconnected AI, content, and channel systems into a unified experience execution layer.
- Power Mech Projects** secured a Rs 549.37-crore order from Moxie Power Generation for O&M services at its 2x600 MW Tuticorin thermal power plant.
- MPS** announced that its Artificial Intelligence Management System (AIMS) has been certified to ISO/IEC 42001:2023, the world's first international standard for AI

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
KOTAKBANK	417.00	406.00	2.71%
INDIGO	4984.00	4872.00	2.30%
ICICIBANK	1321.70	1292.20	2.28%
ULTRACEMCO	10956.00	10829.00	1.17%
SHRIRAMFIN	982.70	971.50	1.15%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
APOLLOHOSP	8165.50	8659.00	-5.70%
MACHEALTH	929.80	982.10	-5.33%
NESTLEIND	1310.00	1345.70	-2.65%
SUNPHARMA	1816.60	1865.00	-2.60%
CIPLA	1346.00	1379.30	-2.41%

(Source: [Moneycontrol](#))

- **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.
- **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.
- **HEG Advanced Materials** said that Replus Engitech has signed a memorandum of understanding (MoU) with Indus Towers for exploring BESS solutions for telecom infrastructure in India.
- **Sun TV Network** was considering separating its Indian Premier League (IPL) business through a potential demerger of its cricket franchise assets.

management systems.

- **LTM** announced that its clients PHINIA and Carrier have been recognized at the ISG Paragon Awards North America 2026. LTM received recognition in the Excellence category for its work with PHINIA and in the Transformation category for its work with Carrier. The ISG Paragon Awards recognize enterprise-provider partnerships that leverage technology, innovation, and new operating models to deliver measurable business impact. The recognitions highlight LTM's ability to help global enterprises accelerate transformation through industry expertise, technology innovation, and execution excellence.
- **KPI Green Energy** received an order worth Rs. 2025 crore from NACOF Oorja for a turnkey 500 MW/550 MWp solar photovoltaic power project. The project is to be developed by NOPL at Dantoor village in Bikaner, Rajasthan. The company would be completely responsible for the engineering, procurement and construction of the order and is scheduled to be completed within 12 months of handing over the project site.
- **Seamec** said that it has entered into a bimco charter party with G R Infraprojects for charter hire of the company's vessel SEAMEC II for a tenure of 180 days, with the option for extension on mutually agreed terms.
- A loud explosion-like sound was reported from **Mangalore Refinery and Petrochemicals Ltd**, which alarmed local residents. They observed dense smoke emerging from the MRPL facility. This incident triggered immediate concern among people in surrounding areas. Further information regarding the circumstances of the explosion is currently awaited by authorities.

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

Global News

- China RatingDog Composite Output Index rose to 52.4 in September, from 52.1 in August. The manufacturing PMI increased to 52.1 in September 2026 from 51.5 in August while the services PMI edged up to 51.6 in September 2026 from 51.4 in the previous month.
- China's NBS Composite PMI Output Index rose to 50.7 in September 2026 from 49.5 in the previous month. The manufacturing PMI rose to 50.1 in September 2026 from 49.8 in August while the non-Manufacturing PMI rose to 50.2 in September 2026 from 49 in each of the previous two months.
- U.S. house price index rose 0.3% from the previous month in July 2026. Year-on-year, house prices rose 2.6%.
- U.S. Conference Board consumer confidence index slumped to 81.9 in September from a downwardly revised 88.6 in August.
- U.K. economy expanded by 0.5% quarter-on-quarter in Q2 2026, revised up from 0.4% in the previous estimate, following 0.6% growth in Q1. On an annual basis, UK GDP expanded 1.4%, accelerating from a revised 0.8% growth in Q1.
- U.K.'s current account deficit narrowed to GBP 19.9 billion (2.5% of GDP) in the second quarter of 2026 from a downwardly revised GBP 21.1 billion in the previous quarter.
- Germany's seasonally adjusted unemployment rate held at 6.4% in September 2026. The number of unemployed rose by a larger-than-expected 12,000 to 3.012 million, the highest level since March 2011.
- Germany's retail sales rose 1.2% month-on-month in August 2026, reversing a 3.4% decline in the previous month. On an annual basis, retail sales declined 0.4%, narrowing from a 2.5% drop in July.
- Germany's import prices rose 8.3% year-on-year in August 2026, accelerating from 6.8% in the previous month. On a monthly basis, import prices increased to 1% from 0.2% in July, beating forecasts of 0.7%.
- French annual inflation rate accelerated for a third consecutive month to 3% in September 2026, compared to 2.4% in August. Compared to the previous month, the CPI decreased 0.3%, following a 0.7% rise.
- French producer prices rose 1.0% month-on-month in August 2026, following a 1.3% increase in July. On an annual basis, domestic producer prices increased 4.8% in August, accelerating from a 3.5% rise in July.
- Japan retail sales in Japan increased 2.7% year-on-year in August 2026, slowing from a downwardly revised 3.7% growth in the previous month. On a monthly basis, retail sales fell 1.2% in August, reversing a downwardly revised 2.1% rise in July.
- Japan's industrial production fell 1.7% month-over-month in August 2026, deepening from a 0.2% drop the prior month. On an annual basis, industrial output rose 3.4%, down from 3.9% in July.

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

Economic News

- Crude Oil traded at US\$ 90.38/bbl (IST 17:00).
- INR strengthened to Rs. 95.83 from Rs. 95.99 against each US\$ resulting in daily change of 0.17%.
- India's fiscal deficit widened to Rs 7.10 lakh crore in the first five months of the current financial year through August, accounting for 41.9% of the government's full-year Budget Estimate. The fiscal deficit stood at 38.1% of the annual target in the corresponding April-August period a year earlier.
- Bank of America Securities has revised its forecast for the Reserve Bank of India's interest rate hikes. It now anticipates a total increase of 100 basis points by mid-2027. The first hike is expected during the monetary policy meeting in October. Economic growth remains strong, while inflation risks are increasing, prompting the RBI to adjust its monetary policy.
- India has cut foodgrain production target to 373.93 million tonnes for the 2026-27 crop year from an estimated output of 376.56 mt in the previous year, as El Nino weather pattern and a deficient monsoon inflate risks to farm yields. Of the overall target, 177.72 mt is expected to come from the rabi season, agriculture minister Shivraj Singh Chouhan, said at the National Agriculture Conference-Rabi Campaign 2026.
- India's services sector recorded broad-based growth in July with 17 of the 19 tracked sectors expanding and 10 registering double-digit gains. The Index of Service Production (ISP) showed that administrative and support services, retail trade, real estate, and accommodation and food services were among the fastest-growing segments of the service economy in July. According to CareEdge Ratings, services output grew by 13.5% year-on-year in July, slightly higher than 13.2% in June.
- India has rejected at the World Trade Organization (WTO), Australia's counter notification which claims that India had exceeded its 10% product-specific de minimis entitlement for sugar for the last 11 years. Stating that neither the government nor state agencies procure sugar from the market and that all purchases are done by private sugar companies, New Delhi said that there is no appropriate basis for any counter notification.

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

Forthcoming Events

Board Meetings as on 01/10/2026

Aarti Industries Limited	Fund Raising
Bajaj Finance Limited	Fund Raising
Bliss GVS Pharma Limited	Fund Raising
Manipal Payment and Identity Solutions Limited	Financial Results

(Source: NSE)

Corporate Actions as on 01/10/2026

Indraprastha Gas Limited	Dividend - Rs 1.50 Per Share
Natco Pharma Limited	Rights 2:21 @ Premium Rs 748/-
R Systems International Limited	Interim Dividend - Rs 8 Per Share

(Source: NSE)

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