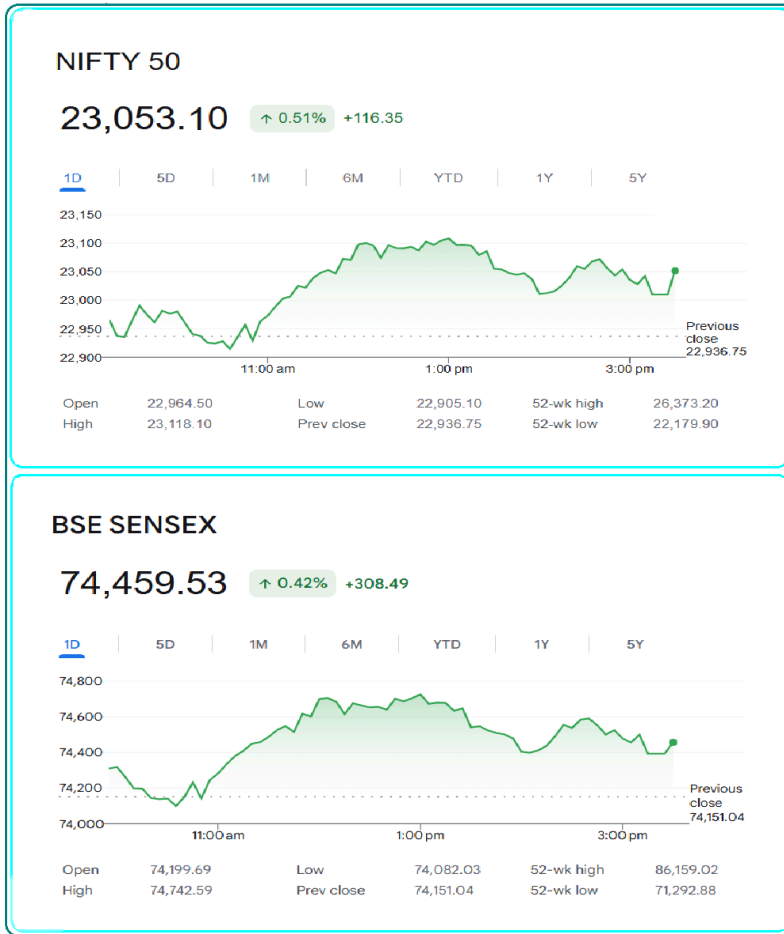


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23053.10	22936.75	0.51%
S&P BSE SENSEX	74459.53	74151.04	0.42%
NIFTY MID100	57301.25	57841.65	-0.93%
NIFTY SML100	18463.60	18811.35	-1.85%

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

Market Wrap Up

- The key equity benchmarks ended higher, supported by buying interest in heavyweight stocks, with the Nifty settled above the 23,050 mark. However, gains remained moderate as elevated crude oil prices and escalating geopolitical tensions in the Middle East kept investors cautious. Brent crude trading above \$115 per barrel heightened concerns over inflationary pressures and India's import bill, potentially limiting the scope for a sustained market recovery.
- The S&P BSE Sensex jumped 308.49 points or 0.42% to 74,459.93. The Nifty 50 index rose 116.35 points or 0.51% to 23,053.10. The Nifty MidCap 150 Index declined 0.93% and the Nifty SmallCap 250 Index fell 1.97%.
- Among the sectoral indices, the Nifty IT index (up 2.32%), the Nifty Healthcare index (up 1.58%) and the Nifty Pharma index (up 1.55%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Consumer Durables index (down 1.78%), the Nifty Media index (down 1.46%) and the Nifty Auto index (down 0.87%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **2366** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **BHARTIARTL**, **ICICIBANK**, **COFORGE**.
- Short** position build up for the **November** series has been witnessed in **RELIANCE**, **BAJFINANCE**, **ADANIPORTS**.
- Unwinding** position for the **August** series has been witnessed in **SBIN**, **HDFCBANK**, **INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54686.95	54909.65	-0.41%
NIFTY AUTO	25422.70	25645.60	-0.87%
NIFTY FMCG	43609.20	43882.95	-0.62%
NIFTY IT	32606.90	31866.40	2.32%
NIFTY METAL	11784.90	11848.45	-0.54%
NIFTY PHARMA	27124.85	26710.80	1.55%
NIFTY REALTY	813.90	819.80	-0.72%
BSE CG	68809.95	70253.53	-2.05%
BSE CD	55760.63	56248.54	-0.87%
BSE Oil & GAS	24322.66	24377.20	-0.22%
BSE POWER	6871.76	6931.02	-0.85%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	63290.11	64659.47	-2.12%
HANG SENG	23294.42	22958.65	1.46%
STRAITS TIMES	5376.74	5396.03	-0.36%
SHANGHAI	3599.02	3651.43	-1.44%
KOSPI	5730.74	5937.66	-3.48%
JAKARTA	5057.05	5098.06	-0.80%
TAIWAN	45211.83	46368.33	-2.49%
KLSE COMPOSITE	1615.60	1611.16	0.28%
ALL ORDINARIES	9025.40	9012.60	0.14%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	120852.45	117989.20
NSE F&O	149639.27	116134.26

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	3598.54
NET SELL	-

(Source: [NSE](#))

Corporate News

- GAIL (India)** posted consolidated net profit rose 139.29% to Rs 4719.66 crore in the quarter ended September 2026 as against Rs 1972.40 crore during the previous quarter ended September 2025. Sales rose 32.65% to Rs 47139.13 crore in the quarter ended September 2026 as against Rs 35537.12 crore during the previous quarter ended September 2025.
- Sun Pharmaceutical Industries Ltd** reported a 36.2% year-on-year decline in consolidated net profit to Rs 1,989 crore for the quarter ended September 2026 (Q2 FY27), compared with Rs 3,118 crore in the corresponding quarter last year. The pharmaceutical company's consolidated revenue stood at Rs 16,199 crore during the July-September quarter.
- Zee Entertainment Enterprises** posted consolidated net profit declined 40.39% to Rs 45.60 crore in the quarter ended September 2026 as against Rs 76.50 crore during the previous quarter ended September 2025. Sales rose 12.97% to Rs 2224.60 crore in the quarter ended September 2026 as against Rs 1969.20 crore during the previous quarter ended September 2025.
- Network18 Media & Investments Ltd** reported a 9.4% year-on-year increase in consolidated operating revenue to Rs 545 crore in the September quarter. Consolidated net profit rose to Rs 53 crore in the September quarter from Rs 41.2 crore a year earlier.
- Varun Beverages** reported a consolidated net profit of Rs 830.59 crore for the July-September quarter, up 13.5% from Rs 731.51 crore in the corresponding quarter last year. Revenue from operations rose 33.2% year-on-year to Rs 6,607.56 crore from Rs 4,960.69 crore.
- Escorts Kubota** plans to implement price hikes on its tractor offerings in November 2026. The company cites inflation and geopolitical uncertainties as significant factors influencing this decision. Price adjustments will vary by model, variant, and geographical regions. These changes come after attempts to optimize costs and maintain operational efficiency. The increases aim to address the elevated expenses from manufacturing and logistics challenges.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TRENT	3017.30	2861.70	5.44%
INDIGO	4877.60	4675.00	4.33%
INFY	1185.00	1146.50	3.36%
APOLLOHOSP	8448.00	8200.00	3.02%
POWERGRID	265.00	260.00	1.92%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	823.15	841.10	-2.13%
NESTLEIND	1167.00	1188.60	-1.82%
M&M	2840.30	2890.00	-1.72%
JIOFIN	204.50	207.00	-1.21%
ADANIPTS	1850.00	1872.00	-1.18%

(Source: [Moneycontrol](#))

- **Reliance Industries** is currently appealing a decision made by the Delhi High Court regarding an arbitration award. The High Court had ruled in February 2025, challenging a previous arbitration award from 2018. This legal dispute involves a \$1.73 billion case against Oil and Natural Gas Corporation (ONGC) over gas extraction issues. The government alleges that Reliance and partners committed fraud and unjust enrichment during gas extraction.

- **Texmaco Rail & Engineering** has received an additional order for the manufacture and supply of 1,020 BOXNS wagons from the Ministry of Railways under the option clause.
- **Trent Ltd** reported 9% increase in net profit at Rs 490 crore for the quarter ended September 30, 2026. The company reported net profit of Rs 451 crore in the year-ago period. Revenue rose 23% to Rs 5,788 crore in Q2FY27 from Rs 4,724 crore in Q2FY26.
- **Deepak Nitrite** reported a 235% year-on-year increase in consolidated net profit to Rs 398 crore in Q2 FY27. Sequentially, net profit increased 15% from Rs 345 crore in Q1 FY27. Revenue from operations increased 61.73% year on year to Rs 3,076 crore from Rs 1,902 crore. Revenue rose 19% sequentially from Rs 2,578 crore in Q1 FY27.
- **Greaves Cotton** reported a 44.2% year-on-year increase in consolidated revenue from operations to Rs 1,175.91 crore in Q2 FY27. Revenue increased 20.72% sequentially from Rs 974.12 crore in Q1 FY27. Adjusted net profit stood at Rs 17.53 crore, down 34.44% year on year from Rs 26.74 crore. It declined 31.98% quarter on quarter from Rs 25.77 crore.

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

Global News

- U.S. initial jobless claims edged down to 194,000 in the week ended October 24th, a decrease of 1,000 from the previous week's revised level of 195,000. Continuing claims fell by 21,000 to 1,701,000.
- U.S. economy expanded an annualized 3.4% in Q3 2026, the most in a year, compared to a 2.2% rise in Q2.
- The European Central Bank left interest rates unchanged at its October 2026 meeting, as expected, keeping the main refinancing rate at 2.65% and the deposit facility rate at 2.50%. The ECB held its key marginal lending facility rate at 2.9% in October 2026, following a 25bps hike in September and June while deposit facility rate steady at 2.5% in its October 2026 meeting, following a 25bps rate hike in both September and June.
- The German economy expanded by 0.2% qoq in Q3 2026, slowing from growth of 0.3% in Q2. On a year-on-year basis however, GDP grew by 1.2%, marking the strongest annual growth rate in four years.

- Germany's seasonally adjusted unemployment rate remained unchanged at 6.4% in October 2026. The number of unemployed increased by a smaller-than-expected 4,000 to 3.016 million, marking the highest level since March 2011.
- Germany's import prices surged 10.4% year-on-year in September 2026, accelerating from 8.3% in the previous month. On a monthly basis, import prices rose by 2.1%, following a 1% gain in August.
- France's economy contracted by 0.1% quarter-on-quarter in Q3 2026, following stagnation in the previous quarter. On a yearly basis, GDP also shrank by 0.1%, marking the first contraction since Q4 2020.
- France's annual inflation rate rose to 3.4% in October 2026, picking up from 3.1% in September. On a monthly basis, consumer prices rose 0.4% in October, following a 0.3% decline in September.
- French domestic producer prices rose 1.7% month-on-month in September 2026, accelerating from 1% in the previous month. On a yearly basis, producer prices climbed 6.8%, up from an upwardly revised 4.9% in August.
- French private payroll employment declined 0.1% quarter-on-quarter, or 25,800 jobs, in the third quarter of 2026, following an identical decrease in the previous period.
- Australia's final demand producer price index increased 1.1% quarter-on-quarter in the third quarter of 2026, slowing from a 1.3% increase in the previous period. On an annual basis, the PPI increased 3.6%, unchanged from the previous quarter.
- The Bank of Japan kept its short-term policy rate unchanged at 1.25% in an 8-1 vote at its October meeting.
- Japan's unemployment rate edged down to 2.4% in September 2026, below August's figure of 2.5%.
- Japan retail sales advanced 2.3% year-on-year in September 2026, easing from an upwardly revised 2.9% increase in the previous month. On a monthly basis, retail sales dropped 0.7% in September, following a revised 0.9% fall in August.
- Japan's industrial production increased by 2.2% month-over-month in September 2026, reversing a 2.4% decline in the previous month. On an annual basis, production rose 1.9%, down from 2.7% in August, marking the softest growth in four months.

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

Economic News

- Crude Oil traded at US\$ 104.07/bbl (IST 17:00).
- INR strengthened to Rs. 94.96 from Rs. 95.26 against each US\$ resulting in daily change of 0.31%.
- India has seen a significant decline in poverty, with the rate dropping from 27.1% to 2.6%. Approximately 496 million people were lifted out of poverty between 2011 and 2023. Employment has increased, particularly among rural women, which contributed to this progress. However, youth unemployment has also risen, particularly among young rural women. The report highlights the need for productive employment opportunities to continue reducing poverty.
- India's services sector recorded widespread growth in August, with 17 of the 19 tracked segments expanding and 13 registering double-digit gains, according to the trial Index of Service Production (ISP). Retail trade led the expansion with

19.9% year-on-year growth, followed by repair services and real estate at 17.6% each. Banking, insurance and IT services also reported strong growth, while CareEdge Ratings estimated overall services output rose 14%.

- The International Monetary Fund (IMF) has flagged the potential impact of the Super El Niño weather phenomenon on India's economy, warning that lower crop yields and higher food prices could weaken household purchasing power. However, the risks have not yet materialised.

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

Forthcoming Events

Board Meetings as on 31/10/2026

NTPC Limited	Financial Results/Dividend
Muthoot Finance Limited	Financial Results
Atul Auto Limited	Financial Results
Birla Corporation Limited	Financial Results/Fund Raising
Central Depository Services (India) Limited	Financial Results
Aditya Birla Lifestyle Brands Limited	Financial Results
Advanced Enzyme Technologies Limited	Financial Results
Advit Jewels Limited	Financial Results
Clean Science and Technology Limited	Financial Results
D-Link (India) Limited	Financial Results
Exxaro Tiles Limited	Financial Results
GHCL Limited	Financial Results
Latent View Analytics Limited	Financial Results
Neogen Chemicals Limited	Financial Results
Pace Digitek Limited	Financial Results
Rainbow Childrens Medicare Limited	Financial Results
Sarda Energy & Minerals Limited	Financial Results
Shyam Metalics and Energy Limited	Financial Results
Sigachi Industries Limited	Financial Results
Studds Accessories Limited	Financial Results
Suraj Estate Developers Limited	Financial Results
Uttam Sugar Mills Limited	Financial Results
Zen Technologies Limited	Financial Results

Board Meetings as on 01/11/2026

Power Grid Corporation of India Limited	Financial Results/Dividend
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Board Meetings as on 02/11/2026

ITC Limited	Financial Results
Escorts Kubota Limited	Financial Results
Marico Limited	Financial Results
Akums Drugs and Pharmaceuticals Limited	Financial Results
Amara Raja Energy & Mobility Limited	Financial Results/Dividend
Arvind Fashions Limited	Financial Results
Balaji Amines Limited	Financial Results
Balmer Lawrie & Company Limited	Financial Results
Bharat Wire Ropes Limited	Financial Results
BLS E-Services Limited	Financial Results
BOSCH HOME COMFORT INDIA LIMITED	Financial Results
Carborundum Universal Limited	Financial Results
Choice International Limited	Financial Results/Bonus
Container Corporation of India Limited	Financial Results/Dividend
Devyani International Limited	Financial Results
DOMS Industries Limited	Financial Results
EPack Prefab Technologies Limited	Financial Results
ESDS Software Solution Limited	Financial Results
Eureka Forbes Limited	Financial Results
Fine Organic Industries Limited	Financial Results
Flair Writing Industries Limited	Financial Results/Dividend
Granules India Limited	Financial Results
Greenpanel Industries Limited	Financial Results
Gujarat Narmada Valley Fertilizers and Chemicals Limited	Financial Results
Gujarat State Fertilizers & Chemicals Limited	Financial Results
Happiest Minds Technologies Limited	Financial Results/Dividend
HEC Infra Projects Limited	Financial Results
Ideaforge Technology Limited	Financial Results
IFB Agro Industries Limited	Financial Results
Jay Bharat Maruti Limited	Financial Results
KEC International Limited	Financial Results
Kewal Kiran Clothing Limited	Financial Results/Dividend
Kitex Garments Limited	Financial Results
KRBL Limited	Financial Results
Krsnaa Diagnostics Limited	Financial Results
Mindspace Business Parks REIT	Financial Results
MOIL Limited	Financial Results/Dividend
Mold-Tek Packaging Limited	Financial Results
National Aluminium Company Limited	Financial Results/Dividend

NLC India Limited	Financial Results/Dividend/Fund Raising
One Mobikwik Systems Limited	Financial Results
Orient Technologies Limited	Financial Results/Dividend
PCBL Chemical Limited	Financial Results
Petronet LNG Limited	Financial Results/Dividend
Procter & Gamble Health Limited	Financial Results
PTC India Limited	Financial Results
Puravankara Limited	Financial Results
RSWM Limited	Financial Results
Rupa & Company Limited	Financial Results
S H Kelkar and Company Limited	Financial Results
Sheela Foam Limited	Financial Results
Shemaroo Entertainment Limited	Financial Results
Signpost India Limited	Financial Results
Sun Pharma Advanced Research Company Limited	Financial Results
Tamilnadu PetroProducts Limited	Financial Results
Tata Investment Corporation Limited	Financial Results
TBO Tek Limited	Financial Results
Thomas Cook (India) Limited	Financial Results
Trident Limited	Financial Results
Triveni Engineering & Industries Limited	Financial Results
TV Today Network Limited	Financial Results
UPL Limited	Financial Results
Vesuvius India Limited	Financial Results
VRL Logistics Limited	Financial Results
Walchandnagar Industries Limited	Financial Results
Wockhardt Limited	Financial Results
Wonderla Holidays Limited	Financial Results
Xtranet Technologies Limited	Financial Results
Zuari Agro Chemicals Limited	Financial Results

(Source: NSE)

Corporate Actions as on 02/11/2026

Colgate Palmolive (India) Limited	Interim Dividend - Rs 24 Per Share
Pitti Engineering Limited	Interim Dividend - Rs 2 Per Share
ROUTE MOBILE LIMITED	Interim Dividend - Rs 4 Per Share
Tanla Platforms Limited	Interim Dividend - Rs 6 Per Share

(Source: NSE)

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