ventura

Daily Updates

Market Commentary

Overnight global action:

On 21st September 2026, US markets ended higher, with the S&P 500 gaining by 114.3 pts (+1.49%), Dow Jones rising by 367.6 pts (+0.71%) and Nasdaq 100 advancing by 838.2 pts (+2.83%). Gift Nifty gained 88.0 pts (+0.38%), indicating a positive opening for Indian markets.

NSE breadth turned negative with 1,735 advances against 1,858 declines, while BSE witnessed 2,129 advances versus 2,334 declines.

Index Options Data Analysis:

Nifty OI peaks at 23,500 Calls and 23,400 Puts. PCR stands at 1.28.
Sensex OI peaks at 77,000 Calls and 74,500 Puts. PCR stands at 1.48.
Bank Nifty OI peaks at 58,000 Calls and 57,500 Puts. PCR stands at 1.18.

Securities in Ban for F&O Trade:

BANDHANBNK, INOXWIND, LICHSGFIN, MANAPPURAM, SAIL

Sector Performance:

NIFTY 50 index grew by 0.29 % driven by ETERNAL(+2.77%), HCLTECH(+2.54%), ITC(+1.79%)

NIFTY 100 index grew by 0.25 % driven by SOLARINDS(+3.83%), ETERNAL(+2.77%), TORNTPHARM(+2.69%)

NIFTY INDIA FPI 150 index grew by 0.18 % driven by MANKIND(+5.96%), SOLARINDS(+3.83%), NAUKRI(+3.61%)

NIFTY MIDCAP 150 index declined by -0.37 % dragged by UNOMINDA(-4.40%), OFSS(-8.28%), APLAPOLLO(-3.92%)

NIFTY MIDCAP 100 index declined by -0.29 % dragged by OFSS(-8.28%), APLAPOLLO(-3.92%), UPL(-3.47%)

NIFTY MIDSMALLCAP 400 index declined by -0.26 % dragged by ANURAS(-4.72%), OFSS(-8.28%), UNOMINDA(-4.40%)

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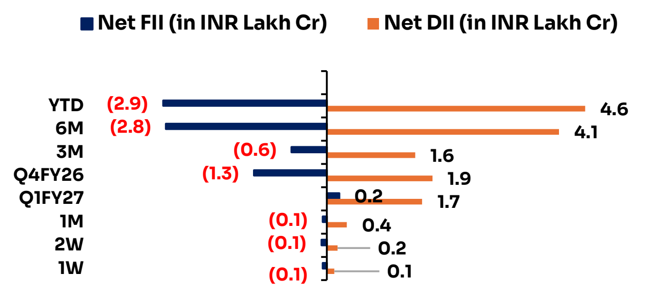
Fund Flow - 22nd Sep 2026	Buy	Sell	Net
FII/FPI (INR Cr)	10,637.2	11,213.4	-576.2
DII (INR Cr)	14,098.6	11,301.4	2,797.3



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	23,528	0.38%	-10.46%	21.3
Sensex 30	74,859	0.76%	-12.16%	19.6
Nifty 50	23,414	0.29%	-10.39%	21.2
India VIX	11	-1.03%	18.92%	
Nifty Bank	56,471	0.20%	-5.22%	16.6
Nifty Next 50	72,084	0.08%	3.92%	72.1
Nifty 500	22,860	0.09%	-4.24%	21.5
Nifty Mid 100	62,013	-0.29%	2.53%	31.9
Nifty Small 250	18,279	-0.05%	9.56%	30.8
USD/INR	95.8	0.00%	6.52%	
India 10Y	7.1%			
India 2Y	6.4%			
India 1Y	6.2%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,765	1.49%	13.43%	33.6
Dow Jones	52,050	0.71%	8.30%	25.1
Nasdaq 100	30,482	2.83%	20.72%	50.1
FTSE 100	10,739	0.75%	8.13%	16.9
CAC 40	8,139	0.92%	-0.13%	23.9
DAX	25,575	1.07%	4.43%	26.7
Nikkei 225	65,019	1.38%	29.16%	34.7
Hang Seng	25,043	1.18%	-2.29%	12.2
Shanghai Comp	3,950	0.97%	-0.48%	17.9
KOSPI	7,169	2.30%	70.02%	35.5
S&P/ASX 200	8,774	0.49%	0.61%	23.2

Stocks in the News

SOLAR INDUSTRIES INDIA (CMP: 19265, MARKET CAP: 174329 Cr., SECTOR: EXPLOSIVES & DEFENCE)

NSE Filing

Subsidiary Solar SA Investments signed agreements to acquire all outstanding shares of Omnia Holdings for ₹12,951 crore, in cash.Omnia recorded FY26 revenue of ₹13,307 crore, operates in 23 countries and serves customers in over 40 countries.Completion remains subject to regulatory approvals, Omnia shareholder approval and customary closing conditions. (nsearchives.nseindia.com)

BEML (CMP: 2098, MARKET CAP: 17473 Cr., SECTOR: RAIL EQUIPMENT & DEFENCE)

NSE Filing

Secured an order exceeding ₹5,400 crore from National High Speed Rail Corporation.The award covers high-speed rolling stock for the Mumbai–Ahmedabad High Speed Rail project.The contract also includes maintenance of the rolling stock; the award was announced on 18 September. (Key Insights - Screener)

YATHARTH HOSPITAL (CMP: 1125, MARKET CAP: 10843 Cr., SECTOR: HOSPITALS)

NSE Filing

Advent International agreed to invest ₹3,150 crore of primary capital for an expected 24.9% stake.The Tyagi family will remain the largest shareholder following completion, which is subject to closing conditions.Yatharth operates nine hospitals with approximately 2,800 beds, against total announced capacity of approximately 3,250 beds. (nsearchives.nseindia.com)

UNO MINDA (CMP: 1228, MARKET CAP: 70884 Cr., SECTOR: AUTO COMPONENTS)

NSE Filing

Announced four expansion projects totalling ₹1,415 crore, covering castings, alloy wheels, moulding and interior/exterior parts and sealing systems.The ₹510 crore Hosur project will increase aluminium-casting capacity from approximately 13,000 to 30,000 tonnes, with Phase 1 production targeted for Q4FY28.The ₹155 crore Kharkhoda project covers 3.3 million two-wheeler alloy wheels, including relocation of 2 million units from Supa; Phase 1 is targeted for Q4FY28. (nsearchives.nseindia.com)

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	27,151	0.08%	-3.68%	22.4
Nifty IT	28,831	-0.08%	-23.90%	22.5
Nifty Fin Ser	25,525	0.06%	-7.56%	16.7
Nifty Pharma	27,021	1.16%	18.91%	44.4
Nifty Services	30,062	-0.04%	-10.68%	33.1
Nifty Cons Dur	38,207	0.95%	3.95%	51.8
Nifty PSE	9,604	0.07%	-2.53%	10.1
Nifty FMCG	45,901	0.95%	-17.26%	31.6
Nifty Pvt Bank	27,370	0.29%	-4.70%	10.2
Nifty PSU Bank	8,312	-0.06%	-2.59%	13.6
Nifty Cons	11,509	0.42%	-6.35%	40.7
Nifty Energy	37,819	0.12%	7.06%	12.0
Nifty Health	16,797	1.10%	14.73%	40.2
Nifty India Mfg	15,945	0.09%	3.45%	29.7
Nifty Metal	12,973	-0.61%	16.16%	23.2
Nifty Oil & Gas	11,006	0.53%	-10.01%	16.9

Derivatives Position (Combined)

Stock	% Chg OI	%Chg LTP
Long		
PATANJALI	8.3	9.3
AUROPHARMA	5.7	0.4
GMRAIRPORT	4.9	1.0
LICHSGFIN	4.4	3.2
DELHIVERY	3.5	1.5
Short		
OFSS	11.4	-5.7
SONACOMS	9.3	-1.5
BSE	8.3	-3.2
CDSL	7.0	-2.1
KFINTECH	6.3	-1.0
Long Unwinding		
PAYTM	-3.1	-0.5
360ONE	-2.4	-0.1
ABCAPITAL	-2.0	-0.2
CIPLA	-1.8	-0.1
EICHERMOT	-1.7	-0.2
Short Covering		
TCS	-5.4	1.6
MANKIND	-4.4	5.1
SOLARINDS	-4.2	2.5
ICICIGI	-4.0	2.6
MFSL	-3.2	1.2

GUJARAT THEMIS BIOSYN (CMP: 414, MARKET CAP: 5384 Cr., SECTOR: PHARMACEUTICALS / CDMO)

NSE Filing

Completed acquisition of 100% of MicroBiopharm Japan through its Japanese subsidiary for JPY21.5 billion.GTBL contributed ₹475 crore as equity and ₹745 crore as a loan to the acquisition subsidiary.MicroBiopharm operates three GMP-compliant plants, reported FY26 revenue of JPY9.5 billion, and generates approximately 40% of revenue outside Japan. (nsearchives.nseindia.com)

Commodities	CMP	1D	YTD
Gold ($)	4,371	0.65%	1.03%
Silver ($)	66.7	1.12%	-7.8%

Currency	CMP	1D	YTD
USD/INR	95.8	0.00%	6.52%
EUR/INR	109.8	-0.11%	3.91%
GBP/INR	128.0	-0.12%	5.69%
JPY/INR	0.6	0.06%	5.92%
EUR/USD	1.1	0.02%	-2.41%

Securities Lending & Borrowing Scheme

Company	Under.Ltp	Fut.Ltp	Spread (%)
SAIL	177.30	175.24	1.16
PREMIERENE	919.90	910.00	1.08
BLUESTARCO	1,565.00	1,554.40	0.68
COCHINSHIP	1,385.00	1,376.20	0.64
ATHERENERG	1,593.00	1,584.00	0.56

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
LAURUSLABS	2,018	2,024	1,982	18-Sep-26
AUROPHARMA	1,713	1,739	1,734	18-Sep-26
APARINDS	18,940	19,128	19,080	18-Sep-26
AEGISLOG	1,470	1,500	1,498	6-Aug-26
ACMESOLAR	457	464	441	18-Sep-26

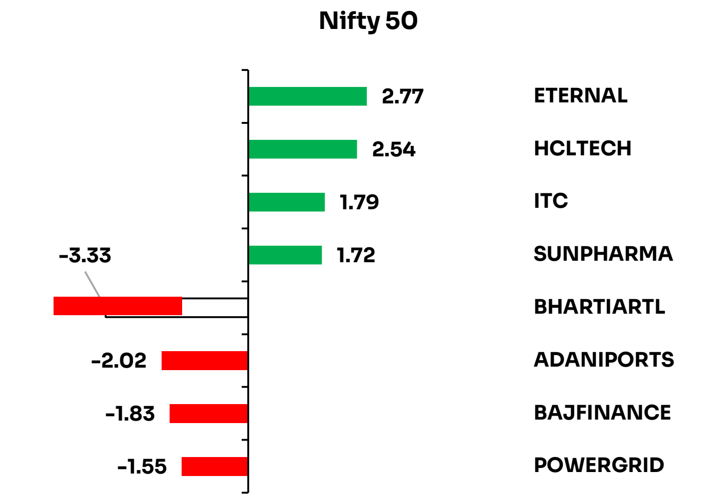
52 Week Low

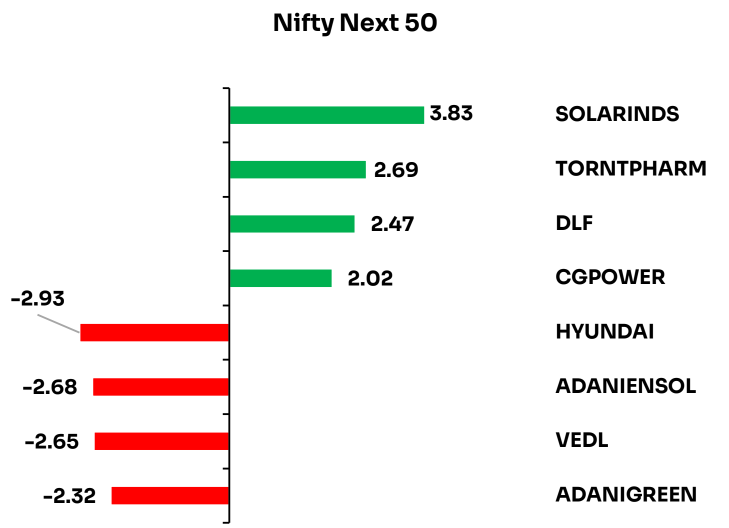
Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
PGHH	7,410	7,410	7,432	18-Sep-26
GILLETTE	7,050	6,922	7,032	18-Sep-26
GODIGIT	242	232	236	18-Sep-26
IRB	18	18	18	18-Sep-26
SUNTV	457	447	448	9-Sep-26

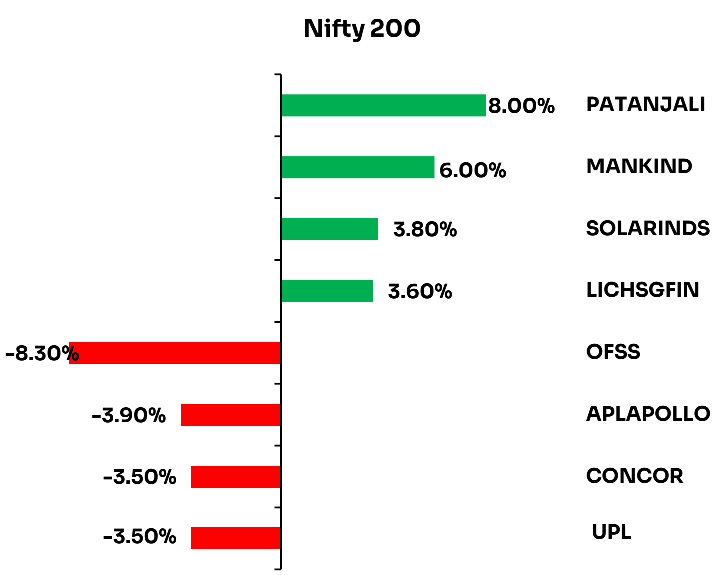
Volume Shockers

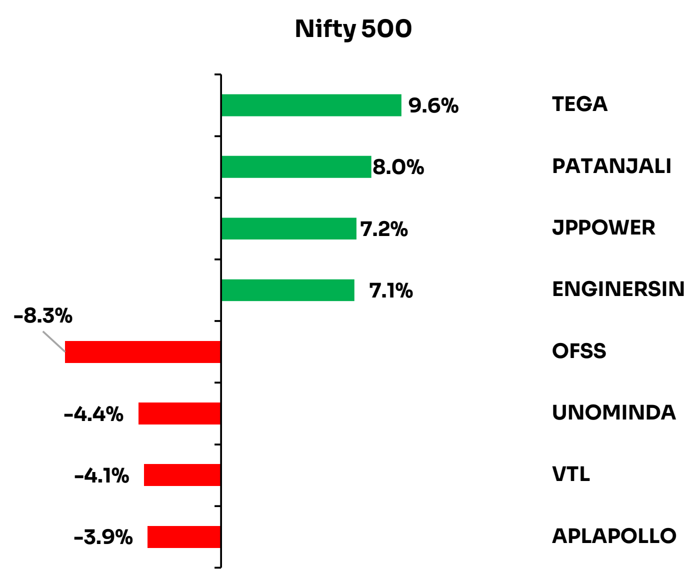
Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
JASH	14,685	3,044	1,635	581
BANK10ADD	2,666	558	478	17
TARSONS	5,943	1,266	689	346
PROTEAN	7,996	1,742	986	588
SUNDROP	221	48	35	711
SVGLOBAL	98	22	14	159
STUDDS	980	217	136	426
CROWN	284	63	37	120
ITADD	1,516	338	214	31
GAJA	18,147	4,080	2,573	162
KPIGREEN	18,326	4,200	2,532	321
CONS	364	84	136	12
REFEX	7,460	1,724	954	295
ASHIANA	1,011	234	132	400
TANAA	226	52	41	320
ARCHIES	171	40	35	13
ARVEE	61	15	32	209
SHANTI	293	73	59	6
ISGEC	593	149	103	853
JPPOWER	587,859	148,082	96,221	17
ALKALI	645	163	153	98
ANURAS	6,031	1,541	878	1,151
CARBORUNIV	3,768	963	555	1,177
COHANCE	8,799	2,273	1,717	458
FACT	1,322	346	252	797

Top Gainers & Losers









Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
AARTIPHARM	UNIFI CAPITAL PRIVATE LIMITED	BUY	915	820
AGIIL	ARIHANT CAPITAL MARKETS LIMITED	BUY	695	272
AGIIL	ARIHANT CAPITAL MARKETS LIMITED	SELL	695	272
AHCL	HRTI PRIVATE LIMITED	BUY	6761	25
AHCL	HRTI PRIVATE LIMITED	SELL	7313	25
AHCL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	7812	25
AHCL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	7813	25
AHCL	MICROCURVES TRADING PRIVATE LIMITED	BUY	4668	26
AHCL	MICROCURVES TRADING PRIVATE LIMITED	SELL	4668	26
AHCL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	5192	25
AHCL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	5192	25
AHCL	PLUTUS WEALTH MANAGEMENT LLP	SELL	3275	25
AHCL	PLUTUS WEALTH MANAGEMENT LLP	BUY	3275	25
AHCL	QE SECURITIES LLP	BUY	4815	25
AHCL	QE SECURITIES LLP	SELL	4888	25
ANURAS	360 ONE PIPE FUND	BUY	900	1165
ANURAS	ASHAPURA COMMODITIES	SELL	1502	1165
ARIS	VAIBHAV RAJENDRA DOSHI	SELL	476	138
ARIS	VAIBHAV RAJENDRA DOSHI	BUY	476	137
ATALREAL	HRTI PRIVATE LIMITED	SELL	1144	14
ATALREAL	HRTI PRIVATE LIMITED	BUY	1329	14
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	SELL	1937	14
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	BUY	2408	14
ATALREAL	L7 HITECH PRIVATE LIMITED	BUY	200	14
ATALREAL	L7 HITECH PRIVATE LIMITED	SELL	1001	14
ATALREAL	QE SECURITIES LLP	BUY	930	14
ATALREAL	QE SECURITIES LLP	SELL	1437	14
AUTOIND	AAYUSHMAN RAJESH NUWAL	BUY	25	85
AUTOIND	AAYUSHMAN RAJESH NUWAL	SELL	369	83
AUTOIND	TRADE SOLVENT PRIVATE LIMITED	BUY	300	84
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	SELL	272	304
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	BUY	287	302
COMSYN	NIRAJ RAJNIKANT SHAH	SELL	415	301
COMSYN	NIRMALKUMAR PAREEK	BUY	175	300
COMSYN	NIRMALKUMAR PAREEK	SELL	317	302
CPCAP	PRUDENT EQUITY PRIVATE LIMITED	SELL	112	149
CROWN	ALPA WEALTH CREATOR	SELL	63	119
DHTL	GOUTHAMCHANDSIMPAL	SELL	61	27
DHTL	GOUTHAMCHANDSIMPAL	BUY	100	27
DHTL	RAMESH JAIN HUF	SELL	101	27
DHTL	RAMESH KUMAR JAIN	BUY	56	27
FEDDERSHOL	ASHUTOSH DHIRENDRAKUMAR MANIAR	SELL	877	62
FEDDERSHOL	ASHUTOSH DHIRENDRAKUMAR MANIAR	BUY	1228	60
FEDDERSHOL	BULLPULSE MARKETEDGE PRIVATE LIMITED	SELL	1000	56
FEDDERSHOL	BULLPULSE MARKETEDGE PRIVATE LIMITED	BUY	1250	57
FEDDERSHOL	HJS SECURITIES PRIVATE LIMITED	SELL	1214	59
FEDDERSHOL	HJS SECURITIES PRIVATE LIMITED	BUY	1252	59
FEDDERSHOL	QE SECURITIES LLP	BUY	1413	61
FEDDERSHOL	QE SECURITIES LLP	SELL	1478	60
FEDDERSHOL	URJA INVESTMENT PTE LTD	SELL	1548	59

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
FEDDERSHOL	URJA INVESTMENT PTE LTD	SELL	1548	59
FEDDERSHOL	URJA INVESTMENT PTE LTD	BUY	1548	59
FEDDERSHOL	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	1241	63
FEDDERSHOL	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	1421	63
GAJA	MICROCURVES TRADING PRIVATE LIMITED	BUY	888	162
GAJA	MICROCURVES TRADING PRIVATE LIMITED	SELL	888	162
GCSL	ACE INDUSTRIES (INDIA) PRIVATE LIMITED	SELL	130	637
GCSL	HRTI PRIVATE LIMITED	SELL	44	634
GCSL	HRTI PRIVATE LIMITED	BUY	172	636
GCSL	KURJIBHAI PREMJIBHAI RUPARELIYA	BUY	825	637
GCSL	L7 HITECH PRIVATE LIMITED	BUY	25	635
GCSL	L7 HITECH PRIVATE LIMITED	SELL	198	636
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	BUY	223	634
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	SELL	350	636
GCSL	SIDDHISURI FINVEST PRIVATE LIMITED	SELL	125	635
GCSL	SUMAN KUMAR SARAF	SELL	332	637
GLASSWALL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	2661	279
GLASSWALL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	2661	279
GLASSWALL	ARUN GODAWAT	SELL	1245	279
GLASSWALL	ARUN GODAWAT	BUY	1245	282
GLASSWALL	BLITZQUANT RESEARCH LLP	BUY	877	286
GLASSWALL	BLITZQUANT RESEARCH LLP	SELL	877	286
GLASSWALL	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	BUY	1683	280
GLASSWALL	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	SELL	1683	281
GLASSWALL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	1256	279
GLASSWALL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	1258	279
GLASSWALL	GOLDMINE STOCKS PRIVATE LIMITED	BUY	575	280
GLASSWALL	GOLDMINE STOCKS PRIVATE LIMITED	SELL	575	280
GLASSWALL	GRT STRATEGIC VENTURES LLP	BUY	552	284
GLASSWALL	GRT STRATEGIC VENTURES LLP	SELL	552	284
GLASSWALL	IMC INDIA SECURITIES PRIVATE LIMITED	SELL	506	282
GLASSWALL	IMC INDIA SECURITIES PRIVATE LIMITED	BUY	506	283
GLASSWALL	IRAGE BROKING SERVICES LLP	BUY	908	284
GLASSWALL	IRAGE BROKING SERVICES LLP	SELL	1092	285
GLASSWALL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	2541	280
GLASSWALL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	2541	279
GLASSWALL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1613	281
GLASSWALL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1625	281
GLASSWALL	MATHISYS QUANTCAP LLP	BUY	907	278
GLASSWALL	MATHISYS QUANTCAP LLP	SELL	923	279
GLASSWALL	MICROCURVES TRADING PRIVATE LIMITED	BUY	1856	280
GLASSWALL	MICROCURVES TRADING PRIVATE LIMITED	SELL	1856	280
GLASSWALL	MUSIGMA SECURITIES	SELL	469	281
GLASSWALL	MUSIGMA SECURITIES	BUY	469	281
GLASSWALL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1758	284
GLASSWALL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1758	284
GLASSWALL	PLUTUS WEALTH MANAGEMENT LLP	SELL	3979	281
GLASSWALL	PLUTUS WEALTH MANAGEMENT LLP	BUY	3979	281
GLASSWALL	QE SECURITIES LLP	BUY	2050	278

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
GLASSWALL	QE SECURITIES LLP	SELL	2107	279
GLASSWALL	SMC GLOBAL SECURITIES LIMITED	BUY	574	283
GLASSWALL	SMC GLOBAL SECURITIES LIMITED	SELL	574	283
GLASSWALL	SUNNY GAMBHIR	SELL	435	277
GLASSWALL	SUNNY GAMBHIR	BUY	502	277
JASH	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	346	578
JASH	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	346	578
JASH	CLT RESEARCH TECH PRIVATE LTD	BUY	327	582
JASH	CLT RESEARCH TECH PRIVATE LTD	SELL	327	583
JASH	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	537	581
JASH	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	538	581
JASH	MICROCURVES TRADING PRIVATE LIMITED	BUY	618	582
JASH	MICROCURVES TRADING PRIVATE LIMITED	SELL	618	582
JASH	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	390	583
JASH	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	390	583
JASH	QE SECURITIES LLP	SELL	462	578
JASH	QE SECURITIES LLP	BUY	470	582
KANOHAR	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	496	831
KANOHAR	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	496	830
KANOHAR	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	400	813
KANOHAR	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	400	853
KANOHAR	PLUTUS WEALTH MANAGEMENT LLP	SELL	603	834
KANOHAR	PLUTUS WEALTH MANAGEMENT LLP	BUY	603	833
KROSS	QE SECURITIES LLP	BUY	324	257
KROSS	QE SECURITIES LLP	SELL	326	256
KSHITIJPOL	SATISH MEJIYATAR	BUY	1485	4
KSHITIJPOL	SATISH MEJIYATAR	SELL	2101	4
LENSKART	PLATINUM JASMINE A 2018 TRUST	SELL	35000	683
MANIKA	BHARAT VALUE FUND-SERIES III	BUY	1860	43
MANIKA	EQUISM CAPITAL PRIVATE LIMITED	BUY	970	42
MANIKA	GOLDMAN SACHS (SINGAPORE) PTE	SELL	600	41
MANIKA	RAJASTHAN GLOBAL SECURITIES PVT LTD	SELL	1831	43
MANIKA	VBCUBE VENTURES FUND II	SELL	872	43
MAZDA	CROLL REYNOLDS INTERNATIONAL INC	SELL	113	257
MOS	ASHOK INVESTORS TRUST LIMITED	SELL	6352	6
MOS	SB OPPORTUNITIES FUND I	BUY	3936	6
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	SELL	4410	18
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	BUY	6300	18
MPEL-RE	ARUN GAHLOT	SELL	147	2
MPEL-RE	KAMAL JAGDISH GUPTA	BUY	602	2
MPEL-RE	NEHA ROHAN RAMTEKE	SELL	147	2
MPEL-RE	SONAL KAMAL GUPTA	BUY	602	2
MPEL-RE	VINEET BHADAURIA	SELL	1126	2
MVELECTRO	HRTI PRIVATE LIMITED	BUY	344	870
MVELECTRO	HRTI PRIVATE LIMITED	SELL	359	870
MVELECTRO	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	194	875
MVELECTRO	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	194	881
MVELECTRO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	150	875
MVELECTRO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	151	876

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
MVELECTRO	PLUTUS WEALTH MANAGEMENT LLP	SELL	167	870
MVELECTRO	QE SECURITIES LLP	BUY	148	868
MVELECTRO	QE SECURITIES LLP	SELL	150	866
MVELECTRO	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	109	885
MVELECTRO	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	168	893
PRESSTONIC	SHAH DIPAK KANAYALAL	BUY	83	35
PROTEAN	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	215	559
PROTEAN	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	228	561
PROTEAN	MICROCURVES TRADING PRIVATE LIMITED	BUY	356	562
PROTEAN	MICROCURVES TRADING PRIVATE LIMITED	SELL	356	562
PROTEAN	QE SECURITIES LLP	BUY	291	557
PROTEAN	QE SECURITIES LLP	SELL	307	559
QUALIANCE	NEO APEX SHARE BROKING SERVICES LLP	SELL	26	183
QUALIANCE	NEO APEX SHARE BROKING SERVICES LLP	BUY	267	183
RATNAVEER	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	624	328
RATNAVEER	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	624	327
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	SELL	1636	330
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	BUY	1842	321
RATNAVEER	HRTI PRIVATE LIMITED	SELL	922	326
RATNAVEER	HRTI PRIVATE LIMITED	BUY	973	330
RATNAVEER	JAINAM BROKING LIMITED	BUY	502	327
RATNAVEER	JAINAM BROKING LIMITED	SELL	553	334
RATNAVEER	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	436	325
RATNAVEER	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	436	325
RATNAVEER	MICROCURVES TRADING PRIVATE LIMITED	BUY	756	329
RATNAVEER	MICROCURVES TRADING PRIVATE LIMITED	SELL	756	330
RATNAVEER	QE SECURITIES LLP	BUY	922	327
RATNAVEER	QE SECURITIES LLP	SELL	967	326
RATNAVEER	SIDDHISURI FINVEST PRIVATE LIMITED	BUY	500	335
RAYMOND	HRTI PRIVATE LIMITED	SELL	559	1045
RAYMOND	HRTI PRIVATE LIMITED	BUY	597	1044
RENTOMOJO	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	600	526
RENTOMOJO	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	600	532
RENTOMOJO	PLUTUS WEALTH MANAGEMENT LLP	BUY	626	528
RENTOMOJO	PLUTUS WEALTH MANAGEMENT LLP	SELL	626	528
SAMBHV	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	2841	156
SAMBHV	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	2841	156
SAMBHV	HRTI PRIVATE LIMITED	BUY	1332	155
SAMBHV	HRTI PRIVATE LIMITED	SELL	1647	155
SAMBHV	MICROCURVES TRADING PRIVATE LIMITED	SELL	2853	156
SAMBHV	MICROCURVES TRADING PRIVATE LIMITED	BUY	2853	156
SAMBHV	MUSIGMA SECURITIES	SELL	1500	156
SAMBHV	MUSIGMA SECURITIES	BUY	1500	156
SAMBHV	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1513	157
SAMBHV	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1513	157
SAMBHV	QE SECURITIES LLP	BUY	2723	155
SAMBHV	QE SECURITIES LLP	SELL	2743	156
SKYWAYS	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	1604	131
SKYWAYS	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	1604	132

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
SKYWAYS	HRTI PRIVATE LIMITED	BUY	946	131
SKYWAYS	PLUTUS WEALTH MANAGEMENT LLP	BUY	1257	131
SKYWAYS	PLUTUS WEALTH MANAGEMENT LLP	SELL	1257	131
SKYWAYS	QE SECURITIES LLP	BUY	2082	131
SKYWAYS	QE SECURITIES LLP	SELL	2167	130
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	BUY	942	397
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	SELL	1147	416
SUNSHINE	DILIP R DOSHI	BUY	300	420
SUNSHINE	HRTI PRIVATE LIMITED	SELL	140	407
SUNSHINE	HRTI PRIVATE LIMITED	BUY	206	406
SUNSHINE	NIRMALKUMAR PAREEK	BUY	25	409
SUNSHINE	NIRMALKUMAR PAREEK	SELL	170	393
SUNSHINE	TRADE SOLVENT PRIVATE LIMITED	BUY	240	422
SUNSHINE	UNI GROWTH FUND	SELL	278	390
TECHD	PCG FINVEST PRIVATE LIMITED	SELL	51	548
UCL	SARVAD INFRABUILD LLP	SELL	186	226
UCL	SERA INVESTMENTS & FINANCE INDIA LIMITED	BUY	130	226
VEEGALAND	NEO APEX SHARE BROKING SERVICES LLP	BUY	0	143
VEEGALAND	NEO APEX SHARE BROKING SERVICES LLP	SELL	300	139

Global Macro Events

Event	Previous	Forecast
USA		
ADP Employment Change Weekly	16.25K	
Redbook YoY SEP/19	8.50%	
Richmond Fed Manufacturing Index SEP	4	3
Richmond Fed Manufacturing Shipments Index SEP	11	9
Richmond Fed Services Revenues Index SEP	-8	-6
Fed Williams Speech		
Fed Jefferson Speech		
6-Week Bill Auction	3.85%	
Fed Barkin Speech		
Great Britain		
Public Sector Net Borrowing Ex Banks AUG	£-1.8B	£-12.8B
Treasury Gilt 2032 Auction	4.61%	
CBI Industrial Trends Orders SEP	-25	-40
China		
Denmark		
5-Year Bobl Auction	3.09%	
India		

Nifty & Bank Spot – Pivot Levels 22/09/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	23414.30	23330	23246	23178	23482	23550	23634
Bank Nifty	56470.65	56270	56060	55871	56670	56868	57070

UTI Asset Management Company Ltd – Technical Stock Call – 22/09/2026

Technical Stock Call	Action	CMP	Target	Support	SL
UTIAMC	BUY	924.80	1040	(912-902)-(888-878)	866

Sector: Financial Services (INE094J01016)

About: **UTI Asset Management Company (UTI AMC)** is one of India's leading asset management companies, engaged in managing mutual funds, portfolio management services (PMS), retirement solutions, and international investment funds. It manages investments for ret ail, institutional, and corporate investors across India.

View – Short Term Bullish

The stock commenced its downtrend from 1035.90 (JUL 26).

Forming Down Gaps, the stock started trading below the averages & gradually reached a low of 876 (JUL 26). During the correct ion phase, the stock traded into a consolidation range below 200 SMA & later, extended its decline marking a low around 866.50 levels.

The stock attracted buying interest at lower levels & commenced its up move reaching a high of 923 (SEP 26), but faced resist ance & witnessed a minor correction.

Again, buying interest emerged at lower levels leading to a gradual recovery & recently, after forming higher bottoms, the st ock has given a **Descending Triangle – Bullish Breakout** on the daily chart supported by volumes with a bullish candle reaching to a high of 928 (SEP 26), which is higher than the previous swing highs.

Indicators like MACD, KST & RSI suggests positive crossover.

Target of **1040** is expected with lower support levels at **(912-902)-(888-878)** in case of intermediate fall.

A stop loss at **866** is to be followed for the trade.

Stock specific news

Solar Industries: ₹12,951 Crore Acquisition Proposed
Subsidiary Solar SA Investments agreed to acquire all outstanding shares of Omnia Holdings for ₹12,951 crore in cash.Omnia reported FY26 revenue of ₹13,307 crore and operates in 23 countries.Completion requires regulatory approvals, Omnia shareholder approval and satisfaction of closing conditions. Source

BEML: ₹5,400 Crore Railway Order
Secured an order exceeding ₹5,400 crore from National High Speed Rail Corporation.The contract covers high-speed rolling stock for the Mumbai–Ahmedabad High Speed Rail project.The scope also includes maintenance of the rolling stock. Source

Yatharth Hospital: Advent Acquires Minority Stake
Advent International agreed to invest ₹3,150 crore of primary capital for an expected 24.9% stake.The Tyagi family will remain the largest shareholder after completion, subject to closing conditions.Yatharth operates nine hospitals with approximately 2,800 beds, against announced capacity of approximately 3,250 beds. Source

Canara Bank: ₹2,042 Crore Bonds Issued
Raised ₹2,042 crore through Basel III-compliant Additional Tier I bonds.The bonds carry a coupon of 8.10%.Issuance occurred on 18 September 2026, with confirmation disclosed the following day. Source

Uno Minda: ₹1,415 Crore Expansion Approved
Announced four expansion projects totalling ₹1,415 crore across castings, alloy wheels, moulding and interior/exterior parts and sealing systems.The ₹510 crore Hosur project will increase aluminium-casting capacity from approximately 13,000 to 30,000 tonnes.The ₹155 crore Kharkhoda project covers 3.3 million alloy wheels, including relocation of 2 million units; both projects target initial production in Q4FY28. Source

Gujarat Themis Biosyn: Japan Acquisition Completed
Completed acquisition of 100% of MicroBiopharm Japan for JPY21.5 billion through its Japanese subsidiary.GTBL contributed ₹475 crore as equity and ₹745 crore as a loan to the subsidiary.MicroBiopharm operates three GMP-compliant plants, reported FY26 revenue of JPY9.5 billion, and earns approximately 40% of revenue outside Japan. Source

Petronet LNG: Ten Biogas Plants Approved
Approved a 50:50 joint venture with Gruner Renewable Energy.The venture proposes to develop 10 compressed biogas plants.Combined proposed capital expenditure is approximately ₹1,200 crore. Source

HFCL: Additional Fibre Capex Approved
Approved ₹820 crore of additional capital expenditure.The revised investment programme totals ₹1,800 crore.The programme covers optical fibre, optical fibre cable and preform manufacturing. Source

Saatvik Green Energy: ₹1,042 Crore SECI Order
Secured a ₹1,041.63 crore order from Solar Energy Corporation of India.The contract covers supply of 600 MWp of solar photovoltaic modules.Execution is scheduled to finish by December 2027. Source

Avenue Supermarts: Store Network Reaches 512
Opened a DMart store at Sua Road, Ludhiana, taking the network to 511 stores.Subsequently opened another store at Narmadapuram, Madhya Pradesh.The second opening increased the total store count to 512. Source

OnEMI Technology Solutions: ₹832 Crore Fundraise Proposed
Approved a preferential issue of up to 2.65 crore equity shares, aggregating approximately ₹832.2 crore.The proposal remains subject to shareholder and other applicable approvals.An extraordinary general meeting is scheduled for 14 October 2026. Source

Titagarh Rail Systems: Vande Bharat Maintenance Venture
Announced a 50:50 joint venture with BHEL.The venture covers maintenance of 80 Vande Bharat sleeper trainsets.The maintenance arrangement extends over 35 years. Source

Godrej Industries: ₹750 Crore Debentures Allotted
Allotted 75,000 non-convertible debentures, aggregating ₹750 crore.The debentures carry a coupon of 8.50%.Maturity is scheduled for 18 March 2032. Source

Neogen Chemicals: ₹600 Crore Placement Completed
Completed a qualified institutional placement raising approximately ₹600 crore.Allotted 26,60,753 equity shares at ₹2,255 each.The allotment occurred on 16 September 2026 and was announced the following day. Source

Bajaj Housing Finance: Long Tenure Debentures Allotted
Allotted 50,000 secured non-convertible debentures, with a reported issue amount of ₹495.53 crore.The instruments carry a 7.87% coupon.They mature on 4 August 2036. Source

KNR Constructions: Road Subsidiary Stake Sold
Sold its entire equity holding in KNR Guruvayur Infra to Indus Infra Trust.The disclosed equity consideration was ₹485.86 crore.Separately, the company reported deletion of an ₹18.22 crore income-tax penalty for AY2007–08. Source

RVNL: ₹405 Crore Railway Award
Received a letter of acceptance from East Coast Railway.The awarded contract is valued at ₹404.88 crore.The stipulated execution period is 912 days. Source

Emami: ₹282 Crore Buyback Announced
Approved a share buyback of up to ₹282 crore.The maximum announced buyback price is ₹475 per share.The board approved the proposal on 17 September, followed by the public announcement on 19 September. Source

Knowledge Marine: Mumbai Green Tug Contract
Secured a green-tug contract from Mumbai Port Authority.The contract is valued at ₹279.33 crore.The contractual period is 15 years. Source

Diamond Power: Two Cable Contracts Secured
Secured a ₹263.25 crore order from Maharashtra State Electricity Distribution Company for cables and conductors.Separately, disclosed a ₹179.43 crore order from Adani Electricity Mumbai.The Adani Electricity order covers 871 km of specialised medium-voltage cables. Source

Highway Infrastructure: Gorakhpur Toll Contract Secured
Received a ₹220.66 crore toll-operations contract from UPEIDA.The contract covers the Gorakhpur Link Expressway for two years.The award was disclosed on 16 September, followed by a press release on 18 September. Source

HEG: Subsidiary Wins Battery Contract
Subsidiary Replus Engitech secured a ₹217.56 crore order from Indus Towers.The contract covers supply of lithium-ion battery banks.Execution is scheduled to finish by 31 March 2027. Source

Refex Industries: Ash Handling Contract Secured
Secured an approximately ₹160 crore ash-lifting contract from a Madhya Pradesh public-sector undertaking.The corrected contract quantity is 10 lakh metric tonnes of pond ash and fly ash.The stipulated execution period is 18 months. Source

Anupam Rasayan: ₹160 Crore Debt Approved
Approved issuance of 16,000 secured non-convertible debentures, aggregating ₹160 crore.The proposed coupon is 10.25% per annum.The debentures are scheduled to mature on 21 October 2027. Source

G R Infraprojects: NTPC Invokes Project Guarantees
Following termination of the Mouda battery energy storage project, NTPC invoked two guarantees.These comprise a ₹49.53 crore mobilisation-advance bank guarantee and a ₹41.34 crore insurance performance surety.The combined amount invoked is ₹90.87 crore. Source

Asian Paints: Dahej Polymer Production Begins
Commenced commercial production at its Dahej, Gujarat, VAE plant.The facility has annual production capacity of 150,000 tonnes.Its vinyl acetate ethylene emulsion output is intended for captive consumption. Source

Grasim Industries: Pulp Mill Idling Planned
Joint venture AVNB plans to temporarily idle its Nackawic pulp mill.The mill has annual capacity of approximately 190,000 tonnes.The temporary shutdown is expected around end-October 2026. Source

Dr. Reddy's Laboratories: Takeda Vaccine Distribution Agreement
Entered an exclusive distribution and marketing agreement with Takeda Biopharmaceuticals India for Qdenga.The agreement covers the private market in India for the dengue vaccine.Availability is expected in the first half of calendar 2027. Source

Apollo Pipes: Majority Tile Stake Acquired
Subsidiary Apollo Ceramics acquired a 76% stake in Mazzini Tiles LLP.The acquisition consideration was ₹40.42 crore.The acquired entity operates in the ceramic tiles business. Source

Stallion India Fluorochemicals: Specialty Gas Production Scheduled
Announced commercial operations at its Khalapur, Maharashtra, facility.The facility undertakes debulking and blending of semiconductor and specialty gases.Commercial production was scheduled to begin on 21 September 2026. Source

Macro / Non-Stock News

Markets Gain On Crude Relief
Indian equities ended higher on 21 September 2026 as easing crude prices supported risk appetite. Sensex gained 528 points (+0.76%) to 74,859, while Nifty rose 67.9 points (+0.29%) to 23,414. Pharma, IT and select large caps led gains, while metals and some telecom stocks lagged. Brent crude falling towards $100/bbl improved sentiment for oil-importing economies like India. (The Financial Express)

DII Buying Supports Market
Domestic institutions remained strong buyers, with DIIs purchasing around ₹2,797 crore on 21 September, offsetting foreign selling. FIIs turned net sellers with outflows of approximately ₹576 crore. Persistent DII support remains a key cushion against global risk-off flows. (The Financial Express)

Nifty Holds 23,400 Zone
Nifty closed at 23,414, extending gains for the fourth consecutive session. Options data showed maximum Call OI at 23,500 (1.16 crore contracts) and 23,600 (1.07 crore contracts), while Put OI was highest at 23,400 (1.60 crore contracts) and 23,300 (1.58 crore contracts). Immediate support remains near 23,300, with resistance around 23,500–23,600. (Moneycontrol)

Volatility Remains Low
India VIX declined further to 11.22 (-1.03%), indicating reduced near-term market stress. The Nifty PCR improved to 1.28 from 1.06, reflecting higher Put writing and improved short-term sentiment. However, the index remains below key moving averages, keeping the broader trend cautious. (Moneycontrol)

Brent Drops Below $101
Brent crude declined sharply, falling around 3.5% towards $100.20/bbl, as markets assessed improving supply conditions and easing geopolitical concerns. Lower crude prices reduce India's import bill pressure, support INR stability and provide relief to inflation-sensitive sectors such as paints, aviation and OMCs. (The Financial Express)

Rupee Gains On Dollar Ease
INR strengthened towards 95.72/$, supported by softer crude prices and improved risk sentiment. However, elevated US yields and continued foreign outflows remain risks for currency stability. A sustained rupee recovery would reduce imported inflation concerns. (Jansatta)

US Bond Yields Ease
US 10-year Treasury yield declined below 5% to around 4.96% after touching a multi-year high near 5.04% last week. Lower yields supported global equities by easing valuation pressure, although markets remain focused on further Fed policy signals. (The Wall Street Journal)

Wall Street Rebounds Strongly
US equities rallied as falling oil prices and lower bond yields improved risk appetite. S&P 500 gained around 1.5%, Dow rose about 0.7%, and Nasdaq advanced 2.3%, supported by technology and semiconductor stocks. Positive US cues may provide support to Asian markets, including India. (AP News)

US-China Talks In Focus
US Treasury Secretary Scott Bessent and Chinese Vice Premier He Lifeng continued discussions on trade, AI and critical minerals ahead of the Trump-Xi meeting. Markets are watching for tariff-related developments, as any improvement in US-China relations could support global risk assets and industrial commodities. (Reuters)

Yuan Strength Signals Stability
Chinese yuan strengthened to its highest level in over 3.5 years, trading near 6.6950/$, after the PBOC showed greater tolerance for currency appreciation ahead of US-China talks. The move indicates efforts to maintain financial stability but does not confirm a sustained easing cycle due to weak domestic fundamentals. (Reuters)

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