beyond

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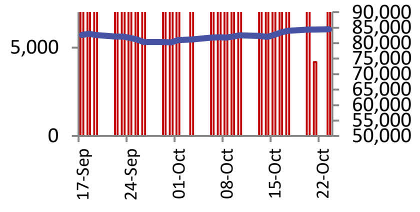
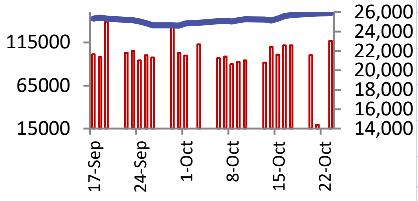
28th October, 2025

Daily Report

BSE		
	Open	84297
	High	84932
	Low	84294
	Close	84779
	Change	567
	Volume (Lacs)	7390
	Turnover (Rs.inCr)	9888



NSE		
	Open	25843
	High	26006
	Low	25827
	Close	25966
	Change	171
	Volume(Lacs)	63883
	Turnover(Rs.in Cr)	96755



World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	47545	47207	337	0.71%
Dow Futures	47711	47712	(1)	0.00%
Nasdaq	23637	23205	433	1.86%
FTSE	9654	9646	8	0.09%
Nikkei	50420	50512	(92)	-0.18%
Hang Seng	26341	26434	(93)	-0.35%
Gift Nifty	26051	26062	(11)	-0.04%
Straits Singapore	4465	4440	25	0.56%
South Korea	3997	4043	(46)	-1.14%
Taiwan	28036	27994	42	0.15%
Shanghai	3993	3997	(4)	-0.09%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper ($/MT)	11029	10963	67	0.6%
Alumin ($/MT)	2875	2859	16	0.5%
Zinc ($/MT)	3055	3026	30	1.0%
Brent Crude ($/bbl)	66	66	(0)	-0.1%
Gold ($/Ounce)	3984	3982	1	0.0%
Silver ($/Ounce)	47	47	(0)	-0.3%
Light Crude ($/bbl)	61	61	(0)	-0.1%
N G ($/mmbtu)	3	3	(0)	-1.2%
Sugar ($/MT)	422	431	(9)	-2.1%
Rubber (Rs./kg)	189	189	0	0.0%
Baltic Dry Index	1976	1991	(15)	-0.8%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./$ rate	88.24	87.85	0.45%
Rs./ Euro	102.69	102.01	0.67%
Rs./Chinese Yuan	12.42	12.41	0.08%
Yen /$ rate	152.43	152.88	-0.29%
$ US/Euro	1.17	1.16	0.09%

Dollar Index	Current	Previous	Var(%)
Dollar Index	98.71	98.78	-0.08%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	25860	57860
Support 2	25750	57530
Resistance	26040	58390

Securities in Ban For Trade	
SAIL	SAMMAANCAP

Market Review

US: Yesterday, US indices closed at all-time highs as Chinese and US trade negotiators lined up an array of diplomatic wins for Donald Trump and Xi Jinping to unveil at a summit this week.

Asia: Asian shares consolidated recent hefty gains on Tuesday as hopes for an easing in global trade tensions kept risk appetites keen, while the bull run in tech stocks counted on a bumper round of big-cap earnings this week.

India: Indian equities traded higher on Monday, rebounding after Friday's pause in a six-session winning streak, as softer-than-expected U.S. inflation data fueled expectations of two additional rate cuts in 2025. **The market is expected to open on a flattish note and likely to witness range bound move during the day.**

Global economy:

Hopes for a game-changing U.S.-China deal is running hot again after weekend headlines, but Macquarie warns that high-stakes talks will help delay escalation rather than the strategic disputes between Washington and Beijing, leaving any real trade deal out of reach.

The Southeast Asian bloc ASEAN and China signed an upgrade to their free trade agreement, which is expected to include sections on digital, green economy and other new industries. The 11-member Association of Southeast Asian Nations is China's largest trading partner, with bilateral trade totaling $771 Bn last year.

Investors are heading into this week's trade talks between the U.S. and Chinese leaders with a sense of deja vu, excited by the proclamations of a truce and apprehensive the real deal may offer far less to celebrate. Stock markets across the world jumped on Monday after U.S. officials said negotiators from both sides had hashed out a framework for agreements for lower U.S. tariffs on Chinese imports and Chinese concessions on rare earth export curbs.

Commodities: Oil prices slipped on Tuesday, extending falls from the two previous sessions, as pressure from plans by OPEC to boost output offset optimism over a potential U.S.-China trade deal.

Gold prices regained some lost ground on Tuesday, rising above the $4,000-per-ounce level as a weaker dollar and expectations of further Federal Reserve rate cuts outweighed pressure from signs of a thaw in U.S.-China trade tensions.

Currency: The dollar was weaker on Tuesday ahead of a slate of central bank meetings that will likely see a rate cut in the U.S. and as investors kept a wary eye on President Donald Trump's Asia tour, hoping for a trade deal with China.

FII Derivative Transactions (Rs. Cr)											
Contracts	Purchase		Sell		Net	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value	Value	Contract	Value	Contract	Value	Contract	Value
Index Future	57522	11294	58607	11537	(243)	221392	43514	211701	41180	9691	2334
Index Option	10278305	2002162	10312423	2008975	(6813)	2546200	498773	2628256	511110	(82056)	(12337)
Stock Future	1701384	121905	1639119	117316	4589	5815294	416986	5797453	412230	17841	4756
Stock Option	465475	35681	477264	36672	(991)	415380	29806	444805	31889	(29425)	(2083)
Total	**12502686**	**2171042**	**12487413**	**2174500**	**(3458)**	**8998266**	**989079**	**9082215**	**996409**	**(83949)**	**(7330)**

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
16-Oct-25	15953	13801	2152
17-Oct-25	15282	14400	882
20-Oct-25	12884	12119	764
23-Oct-25	21625	22422	(797)
24-Oct-25	12056	11489	567
Month to date- Oct	**211095**	**199173**	**11922**
FII (Prov.) (Rs Cr)	**Buy**	**Sell**	**Net**
20-Oct-25	11786	10996	790
21-Oct-25	622	526	97
23-Oct-25	20478	21644	(1166)
24-Oct-25	11768	11147	622
27-Oct-25	11823	11879	(56)
Month to date-Oct	**201870**	**202170**	**(300)**
DII (Prov.) (Rs. Cr)	**Buy**	**Sell**	**Net**
20-Oct-25	15690	13205	2485
21-Oct-25	324	931	(607)
23-Oct-25	19248	15354	3894
24-Oct-25	12476	12303	173
27-Oct-25	14602	12110	2492
Month to date-Oct	**245139**	**208657**	**36482**
FII Debt - BBG (Rs. Cr)	**Buy**	**Sell**	**Net**
16-Oct-25	4337	2102	2236
17-Oct-25	3120	1786	1334
20-Oct-25	1386	171	1215
23-Oct-25	1578	2068	(490)
24-Oct-25	1738	2104	(366)
Month to date- Oct	**44355**	**31996**	**12359**

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2099	47%	1746	51%
Decline	2198	49%	1609	47%
Unchanged	213	5%	90	3%

Market Turnover	27-Oct	24-Oct	Var (%)
BSE Cash	9888	8191	21%
NSE Cash	96755	89132	9%
NSE Futures	401181	410222	-2%
NSE Options	30420969	27453874	11%
Total (Rs.Cr)	30928792	27961420	11%

Volatility Index	27-Oct	24-Oct
Volatility Index	11.86	11.59

Index PE - TTM	27-Oct	Yr. High	Yr. Low
Sensex	23.3	24.1	20.3
Nifty	22.8	23.0	19.6

Corporate News

LTIMindtree Secured $100 Mn Multi-Year Deal with US-based leading global manufacturer of chemicals and polymers. Co will deliver comprehensive IT services, encompassing core Business Applications, Infrastructure Operations, End User Support, Software Asset governance, and Project execution.(NDTV)

Sai Life Sciences Ltd one of India's fastest growing Contract Research, Development, and Manufacturing Organizations (CRDMO) announced that for a new CMC Process R&D Center at its integrated R&D campus in Hyderabad. (NDTV)

RVNL has secured a major infrastructure project awarded by the North Eastern Railway, under its normal course of business operations. The project involves the construction of the substructure of Important Bridge comprising 14 spans of 61.0 metres and the total project value stands at ₹165.54 cr. (CNBC)

HPCL reported significant operational problems at its Mumbai Refinery after processing crude oil with exceptionally high salt and chloride content. The crude, sourced from the B-80 Mumbai Offshore oilfield, caused corrosion in downstream units, suboptimal outputs, and reduced production. (ET)

Economy

India's crude oil imports from the United States surged in October to their highest point since 2022. This will increase is driven by favorable economics and India's strategy to diversify its oil sources. Refiners are booking more US grades to balance supply security and geopolitical considerations. (ET)

India's foreign trade arm, DGFT, is launching a pilot of Bharat Aayat Niryat Lab Setu. This digital platform will connect testing and inspection agencies nationwide. Exporters and importers can submit applications for product testing from November 11. The system aims to speed up certification, improve traceability, and boost trust in India's quality standards. (ET)

International

Amazon is planning to cut as many as 30,000 corporate jobs, as the company pares expenses and compensates for overhiring during the peak demand of the pandemic.The figure represents a small percentage of Amazon's 1.55 mn total employees, but nearly 10% of its roughly 350,000 corporate employees. This would mark Amazon's largest job cut since late 2022, when it started to eliminate around 27,000 positions**.** (Invst)

Taiwan's Foxconn has approved an investment plan to procure equipment for a AI compute cluster and a supercomputing centre, that will allow it to spend up to NT$42 bn ($1.37 bn). The investment will be made from Dec'25 to Dec'26 using its own funds. Foxconn is planning to expand the cloud compute service platform and accelerate the development of the Group's three smart platforms. (Invst)

Daily Report

28th October, 2025

Top 5 Nifty Gainers	27-Oct	24-Oct	Var(%)
SBILIFE	1903	1840	3.4%
GRASIM	2924	2841	2.9%
BHARTIARTL	2080	2029	2.5%
RELIANCE	1484	1452	2.2%
ETERNAL	334	327	2.2%
Top 5 Nifty Losers	**27-Oct**	**24-Oct**	**Var(%)**
KOTAKBANK	2149	2187	-1.8%
BEL	415	422	-1.6%
ONGC	253	255	-0.7%
ADANIPORTS	1421	1429	-0.6%
BAJFINANCE	1084	1090	-0.5%

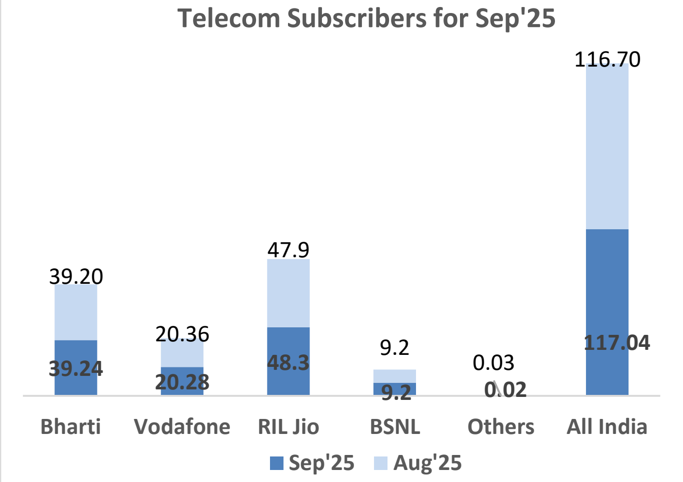
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	84779	0.7%	1.0%	5.4%	6.0%
MIDCAP	46930	0.7%	1.2%	4.9%	2.5%
SMLCAP	53789	0.5%	1.4%	2.9%	1.7%
AUTO	60742	0.6%	0.2%	2.7%	11.3%
BANKEX	65513	0.6%	0.7%	6.7%	12.2%
Capital Goods	69419	0.1%	0.3%	1.6%	4.5%
FMCG	20714	0.2%	-0.2%	2.8%	-3.9%
Health Care	44860	-0.1%	-0.1%	4.2%	3.3%
IT	35355	0.3%	3.4%	6.1%	-15.8%
METAL	34667	1.1%	2.6%	5.8%	11.0%
Oil & Gas	27988	1.5%	2.4%	5.9%	1.5%
Power	6844	0.2%	-0.1%	2.2%	-11.9%
Realty	7414	1.4%	2.2%	10.2%	-4.0%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	107447	-1.3%	-1.3%	10.1%	17.6%
Fresh Exposure	4545	4.5%	-2.4%	-33.9%	-28.5%
Exposure liquidated	3040	-38.4%	-31.6%	-51.0%	-46.8%
Closing Net scripwise outstanding	108952	0.6%	-0.1%	10.9%	18.4%

NSE USD Futures	27-Oct	24-Oct	Var (%)
Oct Expiry (Rs./$)	88.24	88.16	0.1%
Nov Expiry (Rs./$)	88.03	87.82	0.2%
Total Turnover (Rs. Crore)	12654	3302	283%

Sectors	TTM PE
Auto	32.74
Auto Ancillary	43.6
Banking	14.59
Engineering	43.59
Cement	69.2
Diamonds & Jewellery	42.1
Housing Finance	23.77
Infrastructure & Const	26.99
Metals-Aluminium	29.44
Metal – Steel	18.3
Oil Expl.	8.25
Pharma	10.77
Power – Gen. Supp.	40.12
Information Tech.	31.42
Sugar	16.86
Telecom Serv. Prov.	39.78
Tyres	35.33

Telecom Subscribers Data Sep'25 (Source: TRAI, NBRR)



10 year G-Sec Yield	Current	Previous	Change
US	3.98%	3.98%	0 bps
Japan	1.65%	1.67%	(2) bps
India	6.55%	6.53%	1 bps
UK	4.40%	4.43%	(3) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US$ in bn)	602	702	-14.3%
Inflation - WPI	0.52%	-0.58%	110 bps
Inflation - CPI	1.54%	2.07%	(53) bps

India GDP	Q3FY25	Q2FY25	Var (%)
Growth	7.81%	7.38%	43 bps

Monetary Policy	Current	Previous	Change
Repo Rate	5.50%	5.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	3.00%	4.00%	(100) bps
O/S Banking System Liquidity (Rs bn)	-38	-38	(0.4)

IIP Growth %	Aug-25	Aug-24	Apr-Aug
IIP	4.0	0.0	2.9
Capital Goods	4.4	0.0	6.9
Mining	3.8	1.2	4.2
Manufacturing	4.1	-3.7	0.5
Electricity	6.0	-4.3	-2.5

ADR Price Movement									
Company	Price (US$)	Volume	Previous Day Price	Volume	Variance (%)	No. of Share Per ADR	ADR Price (Rs.)	BSE Price	Variance (%)
Infosys Tech	17.04	11499739	17.48	8492498	-2.52%	1	1503.67	1504.50	-0.1%
Wipro	2.67	6113116	2.69	9331886	-0.74%	1	235.61	243.91	-3.4%
Dr.Reddy's	14.47	1646021	14.58	988372	-0.75%	1	1276.89	1284.30	-0.6%
ICICI Bank	31.13	3957205	31.25	3283472	-0.38%	2	1373.51	1377.60	-0.3%
HDFC Bank	36.64	4384577	36.76	3586170	-0.33%	3	1077.75	1002.95	7.5%

GDR's (US$)				
	Prices	Prev. Close	Change	Var %
L&T	44.50	44.55	(0.0)	-0.1%
RIL	67.00	66.10	0.9	1.4%
SBI	106.40	103.20	3.2	3.1%

US Economy Data	Current	Previous
Inflation (%)(YoY)	3.00%	2.90%
Unemployment (%)	4.30%	4.20%

Interest Rate (%)	Current	Previous
Fed Rate	4.25%	4.50%

US GDP	Q2CY25	Q1CY25
Growth (QoQ Annualized)	3.80%	-0.60%

China Economy Data	Current	Previous
GDP	4.80%	5.20%
Inflation – CPI (%)	-0.30%	-0.40%

Economic Calendar	Date
Indian GDP Data	28 Nov
Indian Inflation Data CPI	12 Nov
Indian Inflation Data WPI	14 Nov
Indian Monetary Policy	05 Dec
India's Industrial Production (IIP)	28 Oct
US Inflation Data	13 Nov
US GDP	30 Oct
US Unemployment Data	07 Nov
US Fed Rate	29 Oct
China GDP	To be Announced
China Inflation Data	09 Nov

Event Update		
Name	Date	Purpose
KSE Ltd.	28/10/25	Stock Split from Rs.10/- to Re.1/-
Geekay Wires Ltd.	30/10/25	Second Interim Dividend
Garment Mantra Lifestyle Ltd. - (Partly Paid-up Equity Shares (Rights Issue))	31/10/25	Second and Final Call of Rs. 0.60 (Rupees Sixty paisa Only) (comprising of Rs.0.50/- towards face value and a premium of Rs. 0.10/-) per Rights Equity Share.
Modern Insulators Ltd.	31/10/25	Spin Off
PDS Ltd.	31/10/25	Interim Dividend
360 One Wam Ltd.	27/10/25	Rs.6.00 per share(600%)Second Interim Dividend

Bulk Deal As On 27/10/25

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
539506	ADCON	DEEPAK YALLAPPA MANE	B	3637232	0.78
511605	ARIHANTCAP	HRTI PRIVATE LIMITED	S	649152	107.34
511605	ARIHANTCAP	HRTI PRIVATE LIMITED	B	619526	106.7
511605	ARIHANTCAP	IRAGE BROKING SERVICES LLP	S	1187123	106.56
511605	ARIHANTCAP	IRAGE BROKING SERVICES LLP	B	810380	106.78
539455	ARYAVAN	ROHAN GUPTA	S	34600	40.06
543443	ASCENSIVE	S K PATWARI HUF	B	550000	18.5
513642	AXELPOLY	PARAG HASMUKH DATTANI	B	80000	50.1
513642	AXELPOLY	VAIBHAV EQUISEC PRIVATE LIMITED	S	80000	50.1
524516	BACPHAR	PASHUPATI CAPITAL SERVICE PVT LTD	S	139435	39.01
540829	CHANDRIMA	GREEN PEAKS ENTERPRISES LLP	S	1375000	8.93
540829	CHANDRIMA	GREEN PEAKS ENTERPRISES LLP	B	1879999	8.93
540829	CHANDRIMA	PARNIT VENTURES PRIVATE LIMITED	S	2950000	8.93
540829	CHANDRIMA	PRAS INVESTMENT PRIVATE LIMITED	B	2505748	8.93
539559	DDIL	BHAVISHYA ECOMMERCE PRIVATE LIMITED	S	767381	8.28
539559	DDIL	BHAVISHYA ECOMMERCE PRIVATE LIMITED	B	70551	8.27
531364	EKANSH	CARRON INVESTMENTS PVT LTD	S	337148	227.05
531364	EKANSH	DURVA INFRATECH LLP	B	396970	227.05
543500	EVOQ	HIRJI PARBAT GADA	B	176000	5.81
512443	GANONPRO	NEERAJ KUMAR SINGLA	B	92998	15.45
512443	GANONPRO	REEMA SAROYA	S	134782	15.52
540266	GLCL	SIVALENKA SAI ABHIJEET	S	40600	21.02
526967	HEERAISP	PRANAV ROHIT SHAH	S	44204	7.63
526967	HEERAISP	RAKESH PHOOLCHAND JAIN	B	50000	7.63
532041	HINDBIO	RATNESH YOGESH BHONSLE	S	53501	6.57
543544	JAYANT	NEO APEX VENTURE LLP	S	18750	90.62
543544	JAYANT	NEO APEX VENTURE LLP	B	99750	90.62
543544	JAYANT	PARSHVA TRADING	B	54000	96.99
543544	JAYANT	SETU SECURITIES PRIVATE LIMITED	S	66000	90.62
543544	JAYANT	SETU SECURITIES PRIVATE LIMITED	B	76500	90.62
543544	JAYANT	YASHVI HITESH PATEL	S	87000	109.86
501311	JAYBHCR	RUCHIRA GOYAL	B	30000	32.41
544553	MPKSTEELS	SOLEIL SHARE BROKING PRIVATE LIMITED	B	73600	79
544559	OML	NIKUNJ SHAH	B	142400	39.9
540386	ONTIC	AKALPYA INDIA EQUITY FUND	B	518021	2.35
540386	ONTIC	SAHAJ TRADING AGENCY	S	700000	2.36
540386	ONTIC	VICKY RAJESH JHAVERI	S	667233	2.36
540386	ONTIC	VICKY RAJESH JHAVERI	B	667233	2.33
543798	PATRON	DEEPTHI BAJAJ	B	128000	4.81
543798	PATRON	HIRJI PARBAT GADA	S	612000	4.82
543798	PATRON	JR SEAMLESS PRIVATE LIMITED	B	320000	4.81
540159	PURPLE	SNEHA SANJEEV LUNKAD	S	98608	7.88
530617	SAMPRE	GREEN PEAKS ENTERPRISES LLP	S	106000	169.08
543366	SBLI	NARENDRA BABU KADATHUR HARIDAS	B	6000	48.72
543924	SONALIS	ANJUM SULTANA	B	26000	86.17
531205	SPRIGHT	FIELDSJOY ENTERPRISE PRIVATE LIMITED	S	9868469	0.92
517201	SWITCHTE	D3 STOCK VISION LLP	S	39975	50.12
517201	SWITCHTE	D3 STOCK VISION LLP	B	39975	47.65
517201	SWITCHTE	FERRER PROMOTERS PRIVATE LIMITED	B	79729	50.07
517201	SWITCHTE	GUENTHER AMERICA INC	S	300000	48.68
517201	SWITCHTE	KRIANSH NIRMAAN PRIVATE LIMITED	B	17902	49.76
517201	SWITCHTE	PRIYASHA MEVEN FINANCE LTD.	S	17159	49.74
517201	SWITCHTE	PRIYASHA MEVEN FINANCE LTD.	B	17159	47.62
517201	SWITCHTE	RITIKA RANI	S	15001	48.59

517201	SWITCHTE	RITIKA RANI	B	15001	47.6
517201	SWITCHTE	SETU SECURITIES PRIVATE LIMITED	S	99131	47.59
517201	SWITCHTE	SETU SECURITIES PRIVATE LIMITED	B	99131	47.7
517201	SWITCHTE	SIDDHARTH DINESHBHAI SHAH	B	18000	48.85
517201	SWITCHTE	SUDHANSHU KANDA	B	13500	50.7
517201	SWITCHTE	UNLIT LOGISTICS PRIVATE LIMITED	B	85727	49.89
517201	SWITCHTE	VINOD KUMAR ARORA	S	15001	49.51
517201	SWITCHTE	VINOD KUMAR ARORA	B	15001	47.62

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
360ONE	360 ONE WAM LIMITED	WF ASIAN RECONNAISSANCE FUND LIMITED	SELL	4385856	1179.7
360ONE	360 ONE WAM LIMITED	WF ASIAN RECONNAISSANCE FUND LIMITED	SELL	4385856	1179.7
AAATECH	AAA Technologies Limited	M7 GLOBAL FUND PCC - CELL DEWCAP FUND	BUY	200000	91.05
AAATECH	AAA Technologies Limited	NOVA GLOBAL OPPORTUNITIES FUND PCC - TOUCHSTONE	BUY	300000	91.05
AAATECH	AAA Technologies Limited	RUCHI ANJAY AGARWAL	SELL	500000	91.05
DHANI	Dhani Services Limited	GOLDMAN SACHS BANK EUROPE SE - ODI	BUY	4114800	51.26
FORCAS	Forcas Studio Limited	PROGNOSIS SECURITIES PVT. LTD	BUY	91200	122.55
IEML-RE	Indian Emulsifers Ltd	DIVYA RAKESH AGRAWAL	BUY	43000	23.59
LYPSAGEMS	Lypsa Gems & Jewel Ltd	ANKIT MITTAL	SELL	352550	5.52
MAXVOLT	Maxvolt Energy Indus L	BADAMI NARPATCHAND JAIN	SELL	63200	275.82
MAXVOLT	Maxvolt Energy Indus L	YASH HITESH PATEL	BUY	119200	282.98
SIKKO	Sikko Industries Limited	PUSHPABEN P PATEL	BUY	110000	110.17
SIKKO	Sikko Industries Limited	TATAD NAYAN GAUTAMBHAI	SELL	152630	112
TRANSTEEL	Transteel Seating Tech L	REEMA SAROYA	SELL	134000	124.24
UTKAR-RE	Utkarsh Small Fin Bank L	OLYMPUS ACF PTE.LTD	SELL	6410075	3.53
VIJAYPD	Vijaypd Ceutical Limited	YASHVI HITESH PATEL	SELL	116000	43.09

Disclosure:

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