ventura

Daily Updates

Market Commentary

Overnight global action:

On 18th September 2026, US markets ended mixed, with the S&P 500 gaining by 12.7 pts (+0.17%), Dow Jones declining by 95.4 pts (-0.18%), while Nasdaq 100 advanced by 197.2 pts (+0.67%). Gift Nifty gained 28.0 pts (+0.12%), indicating a marginally positive opening for Indian markets.

NSE breadth remained positive with 2,387 advances against 1,154 declines, while BSE witnessed 2,630 advances versus 1,703 declines.

Index Options Data Analysis:

Nifty OI peaks at 24,000 Calls and 23,300 Puts. PCR stands at 1.12.

Sensex Call and Put OI both peak at 74,500 — heavy ATM congestion zone. PCR stands at 1.67.

Bank Nifty OI peaks at 58,000 Calls and 57,500 Puts. PCR stands at 1.22.

Securities in Ban for F&O Trade:

BANDHANBNK, INOXWIND, MANAPPURAM, SAIL

Sector Performance:

NIFTY SMLCAP 100 index grew by 1.74 % driven by POONAWALLA(+12.06%), WELCORP(+8.12%), JYOTICNC(+7.41%)

NIFTY SMLCAP 50 index grew by 1.73 % driven by POONAWALLA(+12.06%), WELCORP(+8.12%), AEGISLOG(+4.96%)

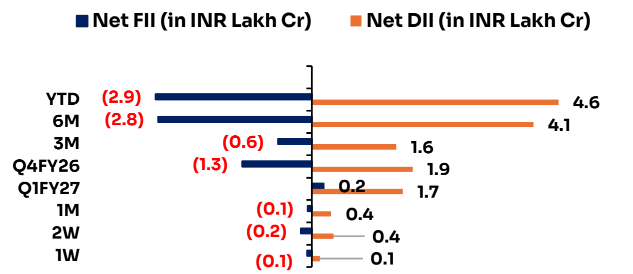
NIFTY MICROCAP 250 index grew by 1.61 % driven by AVALON(+16.68%), CAPILLARY(+8.03%), SMARTWORKS(+7.41%)

NIFTY 50 index grew by 0.33 % dragged by TMPV(-3.40%), TCS(-3.88%), SBILIFE(-2.03%)

NIFTY 100 index grew by 0.5 % dragged by TCS(-3.88%), TMPV(-3.40%), SBILIFE(-2.03%)

NIFTY 200 index grew by 0.65 % dragged by KPITTECH(-4.88%), TCS(-3.88%), TATAELXSI(-3.40%)

Fund Flow - 21st Sep 2026	Buy	Sell	Net
FII/FPI (INR Cr)	17,310.0	16,290.4	1,019.7
DII (INR Cr)	38,461.6	37,862.1	599.5



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	23,361	0.12%	-11.09%	21.2
Sensex 30	74,295	-0.03%	-12.82%	19.4
Nifty 50	23,346	0.33%	-10.65%	21.2
India VIX	11	-7.36%	20.16%	
Nifty Bank	56,359	0.54%	-5.41%	16.6
Nifty Next 50	72,025	1.24%	3.84%	72.0
Nifty 500	22,841	0.82%	-4.32%	21.4
Nifty Mid 100	62,191	1.24%	2.82%	32.0
Nifty Small 250	18,287	1.54%	9.61%	30.8
USD/INR	94.5	0.00%	5.04%	
India 10Y	7.1%			
India 2Y	6.5%			
India 1Y	6.0%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,651	0.17%	11.76%	33.1
Dow Jones	51,683	-0.18%	7.53%	25.0
Nasdaq 100	29,644	0.67%	17.40%	48.7
FTSE 100	10,659	-1.45%	7.33%	16.8
CAC 40	8,065	-1.49%	-1.04%	23.7
DAX	25,304	-1.60%	3.32%	26.4
Nikkei 225	65,019	1.38%	29.16%	34.7
Hang Seng	24,751	0.60%	-3.43%	12.0
Shanghai Comp	3,912	0.94%	-1.44%	17.7
KOSPI	6,951	0.82%	64.92%	34.4
S&P/ASX 200	8,719	-0.14%	0.01%	23.0

Stocks in the News

SOLAR INDUSTRIES INDIA (CMP: 18555, MARKET CAP: 167904 Cr., SECTOR: EXPLOSIVES / DEFENCE)

NSE Filing

Signed definitive agreements to acquire all outstanding shares of South Africa's Omnia Holdings for ₹12,951 crore, through its step-down subsidiary Solar SA.The all-cash acquisition remains subject to regulatory and Omnia shareholder approvals.Omnia reported FY26 revenue of ₹13,307 crore, operates in 23 countries, and owns the BME mining explosives business.

YATHARTH HOSPITALS (CMP: 1140, MARKET CAP: 10980 Cr., SECTOR: HOSPITALS)

NSE Filing

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

UNO MINDA (CMP: 1284, MARKET CAP: 74147 Cr., SECTOR: AUTO COMPONENTS)

NSE Filing

Announced four expansion projects totalling approximately ₹1,415 crore, covering castings, alloy wheels, moulding and vehicle parts/sealing systems.The ₹510 crore Hosur casting project will increase capacity from approximately 13,000 to 30,000 tonnes annually.The ₹155 crore Kharkhoda alloy-wheel project includes relocation of 2 million units from Supa; Phase-I production at both locations is expected by Q4 FY28.

WELSPUN CORP (CMP: 2660, MARKET CAP: 70171 Cr., SECTOR: STEEL PIPES)

NSE Filing

Saudi associate East Pipes Integrated Company for Industry—EPIC—secured a steel-pipe contract from Saudi Aramco.The contract is worth SAR 771 million, as reported in the 20 September announcement.The financial contribution is expected to begin from Q4 FY27; the order belongs to the associate company.

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	27,129	-0.11%	-3.76%	22.3
Nifty IT	28,855	-1.03%	-23.83%	22.5
Nifty Fin Ser	25,510	0.76%	-7.62%	16.7
Nifty Pharma	26,710	0.49%	17.54%	43.9
Nifty Services	30,073	0.80%	-10.65%	33.1
Nifty Cons Dur	37,848	-0.43%	2.97%	51.3
Nifty PSE	9,597	0.45%	-2.60%	10.1
Nifty FMCG	45,467	-0.23%	-18.04%	31.3
Nifty Pvt Bank	27,290	0.44%	-4.98%	10.2
Nifty PSU Bank	8,318	0.66%	-2.53%	13.6
Nifty Cons	11,461	0.29%	-6.74%	40.5
Nifty Energy	37,774	1.05%	6.93%	12.0
Nifty Health	16,614	0.51%	13.48%	39.7
Nifty India Mfg	15,930	0.65%	3.36%	29.7
Nifty Metal	13,053	1.51%	16.88%	23.4
Nifty Oil & Gas	10,949	0.84%	-10.49%	16.8

Derivatives Position (Combined)

Stock	% Chg OI	%Chg LTP
Long		
ATHERENERG	10.0	3.8
WAAREEENER	7.6	2.1
ZYDUSLIFE	5.8	2.1
COLPAL	4.4	2.2
SAGILITY	3.3	2.9
Short		
KPITTECH	7.3	-3.5
NESTLEIND	7.0	-1.0
LTM	6.5	-0.8
KAYNES	6.2	-0.1
MARUTI	5.5	-1.7
Long Unwinding		
HDFCLIFE	-2.8	-0.5
LIC	-2.5	-0.1
SBILIFE	-2.5	-1.1
HINDUNILVR	-2.1	-0.2
TATAPOWER	-2.0	-0.5
Short Covering		
TVSMOTOR	-5.6	1.3
MAHABANK	-5.4	2.1
BPCL	-4.9	1.4
ALKEM	-4.1	0.1
LODHA	-3.8	2.1

Daily Updates

WELSPUN ENTERPRISES (CMP: 823, MARKET CAP: 11396 Cr., SECTOR: WATER INFRASTRUCTURE / EPC)

NSE Filing

Material subsidiary Welspun Michigan Engineers received awards for two sewer-rehabilitation projects in Ahmedabad.The combined contract value is ₹351.24 crore.The projects have an execution period of 24 months, according to the announcement summary dated 20 September 2026.

Commodities	CMP	1D	YTD
Gold ($)	4,476	0.11%	3.67%
Silver ($)	66.8	-0.10%	-7.6%

Currency	CMP	1D	YTD
USD/INR	94.5	0.00%	5.04%
EUR/INR	109.9	-0.09%	4.04%
GBP/INR	127.8	-0.11%	5.57%
JPY/INR	0.6	0.06%	5.87%
EUR/USD	1.2	0.01%	-1.04%

Securities Lending & Borrowing Scheme

Company	Under.Ltp	Fut.Ltp	Spread (%)
UNOMINDA	1,284.00	1,242.00	3.27
APLAPOLLO	2,270.10	2,209.50	2.67
IREDA	114.32	111.35	2.60
PIIND	2,366.80	2,305.90	2.57
SUPREMEIND	3,580.30	3,490.00	2.52

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
LENSKART	721	725	704	10-Sep-26
LAURUSLABS	1,954	1,982	1,982	11-Sep-26
AUROPHARMA	1,734	1,734	1,717	31-Aug-26
APARINDS	18,791	19,080	18,465	12-Aug-26
ANANDRATHI	2,225	2,268	2,255	7-Sep-26

52 Week Low

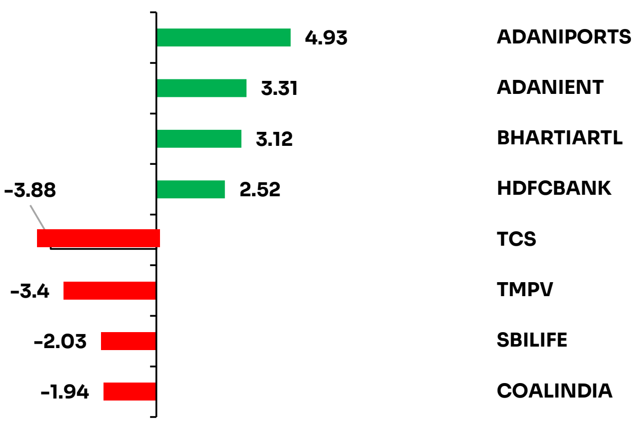
Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
RELIANCE	1,226	1,226	1,235	15-Sep-26
MARUTI	12,103	12,103	12,127	17-Sep-26
BANKBARODA	235	232	232	17-Sep-26
VOLTAS	1,111	1,111	1,125	17-Sep-26
PGHH	7,450	7,432	7,475	15-Sep-26

Volume Shockers

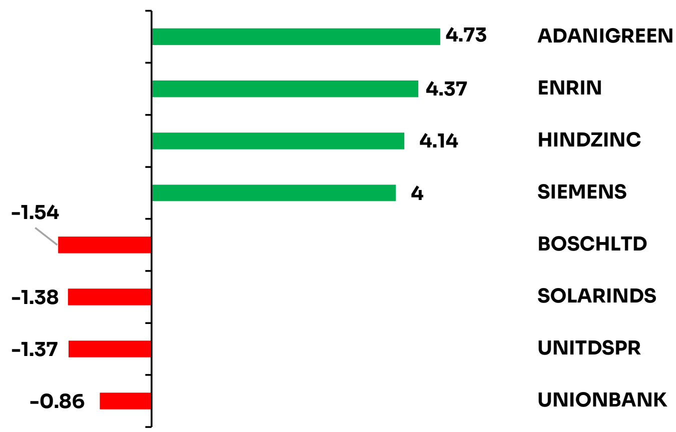
Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
BBTC	2,468	642	310	1,513
NIFTYBETA	2,607	680	319	262
ATGL	39,306	10,259	4,853	658
SKYWAYS	92,941	24,904	14,274	125
MADHAV	26	7	7	35
METROBRAND	918	250	177	951
SKFINDUS	1,294	357	179	2,950
TIMEX	6,651	1,852	1,071	720
ABCOTS	220	61	30	209
NRBBEARING	9,738	2,735	1,637	530
GPTINFRA	3,008	845	476	119
LPDC	457	129	92	7
MANUGRAPH	592	167	78	18
GKB	11	3	5	68
ASTAR	14	4	2	807
AQYLON	38,267	10,879	5,259	18
ENTERO	1,635	465	295	1,730
GRAUWEIL	14,618	4,159	2,145	87
GODIGIT	3,424	978	520	237
COMPUSOFT	299	87	55	14
SAMBHV	28,286	8,261	4,918	150
OMNI	6,046	1,835	1,220	554
HAZOOR	2,905	886	577	19
RELAXO	2,053	629	398	294
NATHBIOGEN	54	17	15	147

Top Gainers & Losers

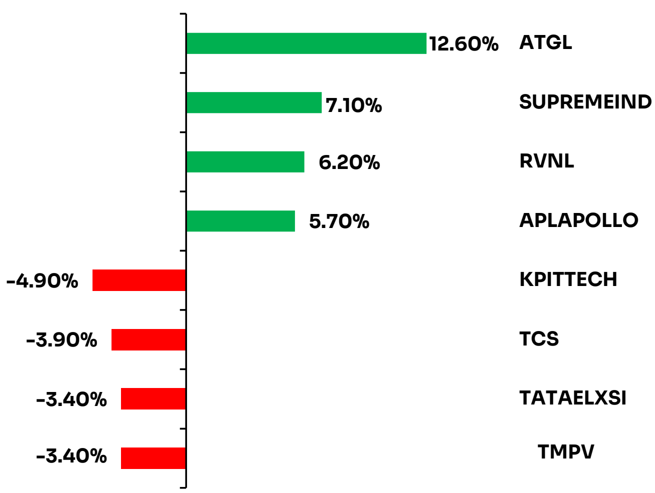
Nifty 50



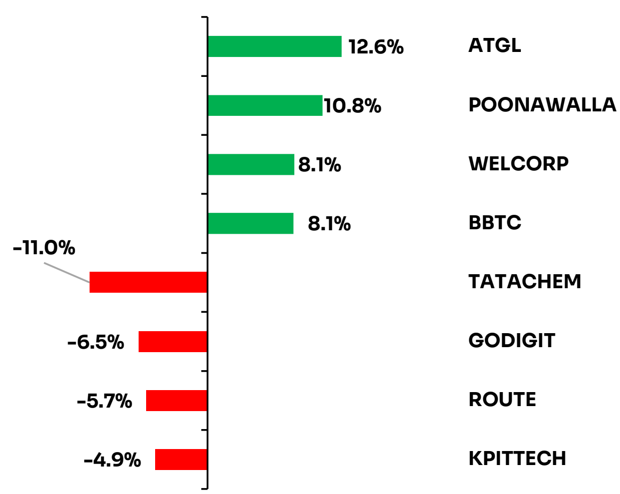
Nifty Next 50



Nifty 200



Nifty 500



Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
AARTIPHARM	JASMINE FAMILY TRUST	SELL	628	820
AHCL	HRTI PRIVATE LIMITED	BUY	10128	24
AHCL	HRTI PRIVATE LIMITED	SELL	10708	24
AHCL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	12821	24
AHCL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	12828	24
AHCL	MICROCURVES TRADING PRIVATE LIMITED	SELL	3264	24
AHCL	MICROCURVES TRADING PRIVATE LIMITED	BUY	3264	24
AHCL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	5161	24
AHCL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	5161	24
AHCL	QE SECURITIES LLP	SELL	4808	24
AHCL	QE SECURITIES LLP	BUY	4823	23
AQYLON	DEALMONEY COMMODITIES PRIVATE LIMITED	SELL	7796	18
AQYLON	DEALMONEY COMMODITIES PRIVATE LIMITED	BUY	8300	18
AQYLON	JAMMS STOCK BROKERS PRIVATE LIMITED	BUY	825	18
AQYLON	JAMMS STOCK BROKERS PRIVATE LIMITED	SELL	1369	18
AQYLON	KAUSHIK SHAH SHARES & SECURITIES PVT LTD	SELL	6300	18
AQYLON	KAUSHIK SHAH SHARES & SECURITIES PVT LTD	BUY	6300	18
AQYLON	KURJIBHAI PREMJIBHAI RUPARELIYA	SELL	17237	18
AQYLON	MANSUKH SECURITIES & FINANCE LIMITED	SELL	1150	18
AQYLON	MANSUKH SECURITIES & FINANCE LIMITED	BUY	1697	18
AQYLON	MOHAMED IRFAN MOHAMED LATIF SHAIKH	BUY	8692	18
AQYLON	RAVI AMIT JALAN	BUY	9000	18
ATALREAL	HRTI PRIVATE LIMITED	SELL	2632	15
ATALREAL	HRTI PRIVATE LIMITED	BUY	2650	15
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	BUY	4213	15
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	SELL	4220	15
ATALREAL	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRI	BUY	194	15
ATALREAL	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRI	SELL	794	14
ATALREAL	QE SECURITIES LLP	SELL	493	15
ATALREAL	QE SECURITIES LLP	BUY	993	15
AVALON	VANGUARD EMERGING MARKETS STOCK INDEX FUND A	BUY	345	2528
AVALON	VANGUARD TOTAL INTERNATIONAL STOCK INDEX FUND	BUY	357	2528
COMSYN	NIRAJ RAJNIKANT SHAH	SELL	250	306
CSM	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	426	109
CSM	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	427	109
CSM	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	354	109
CSM	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	354	109
CSM	QE SECURITIES LLP	BUY	301	108
CSM	QE SECURITIES LLP	SELL	304	108
CSM	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	469	109
CSM	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	469	109
DEEPA	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	677	185
DEEPA	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	680	185
ENTERO	HDFC MUTUAL FUND	BUY	1390	1695
ENTERO	PRASID UNO FAMILY TRUST	SELL	1222	1695
FWSTC	GREEN PARK LEAFIN PRIVATE LIMITED	SELL	51	162
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	SELL	154	614
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	BUY	161	607
GLASSWALL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	2129	280
GLASSWALL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	2129	280

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Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
GLASSWALL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	2129	280
GLASSWALL	ARUN GODAWAT	BUY	595	286
GLASSWALL	ARUN GODAWAT	SELL	595	282
GLASSWALL	ASHWIN STOCKS AND INVESTMENT PRIVATE LIMITED	BUY	309	279
GLASSWALL	ASHWIN STOCKS AND INVESTMENT PRIVATE LIMITED	SELL	609	275
GLASSWALL	BLITZQUANT RESEARCH LLP	BUY	543	289
GLASSWALL	BLITZQUANT RESEARCH LLP	SELL	543	290
GLASSWALL	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	SELL	1940	280
GLASSWALL	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	BUY	1948	279
GLASSWALL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	1977	281
GLASSWALL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	1977	282
GLASSWALL	GOLDMINE STOCKS PRIVATE LIMITED	BUY	723	281
GLASSWALL	GOLDMINE STOCKS PRIVATE LIMITED	SELL	723	281
GLASSWALL	GRT STRATEGIC VENTURES LLP	BUY	591	287
GLASSWALL	GRT STRATEGIC VENTURES LLP	SELL	591	288
GLASSWALL	IRAGE BROKING SERVICES LLP	SELL	1186	280
GLASSWALL	IRAGE BROKING SERVICES LLP	BUY	1460	280
GLASSWALL	J4S FINANCIAL SOLUTIONS LLP	BUY	608	281
GLASSWALL	J4S FINANCIAL SOLUTIONS LLP	SELL	608	281
GLASSWALL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	4220	281
GLASSWALL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	4223	281
GLASSWALL	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRI	BUY	443	272
GLASSWALL	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRI	SELL	451	274
GLASSWALL	MARWADI SHARES AND FINANCE LTD.	SELL	496	279
GLASSWALL	MARWADI SHARES AND FINANCE LTD.	BUY	496	282
GLASSWALL	MATHISYS QUANTCAP LLP	SELL	1038	282
GLASSWALL	MATHISYS QUANTCAP LLP	BUY	1042	281
GLASSWALL	MICROCURVES TRADING PRIVATE LIMITED	BUY	2015	284
GLASSWALL	MICROCURVES TRADING PRIVATE LIMITED	SELL	2015	284
GLASSWALL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	2082	281
GLASSWALL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	2082	281
GLASSWALL	PEER GLOBAL TRADE PRIVATE LIMITED	BUY	712	281
GLASSWALL	PEER GLOBAL TRADE PRIVATE LIMITED	SELL	712	282
GLASSWALL	PLUTUS RESEARCH PRIVATE LIMITED	SELL	1040	280
GLASSWALL	PLUTUS RESEARCH PRIVATE LIMITED	BUY	1041	280
GLASSWALL	PURE BROKING PRIVATE LIMITED	BUY	934	277
GLASSWALL	PURE BROKING PRIVATE LIMITED	SELL	935	278
GLASSWALL	QE SECURITIES LLP	SELL	1408	278
GLASSWALL	QE SECURITIES LLP	BUY	1459	279
GLASSWALL	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	539	276
GLASSWALL	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	539	277
GLASSWALL	VINSUL MAKARDI LTD	BUY	458	280
GLASSWALL	VINSUL MAKARDI LTD	SELL	458	280
GLASSWALL	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	622	279
GLASSWALL	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	897	281
GNA	SEEHRA MANINDER SINGH	SELL	424	557
JETFREIGHT	VAIBHAV RAJENDRA DOSHI	SELL	325	21
JETFREIGHT	VAIBHAV RAJENDRA DOSHI	BUY	325	21
KLL	VICCO TRADING CORPORATION	SELL	135	32

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
KSHITIJPOL	SATISH MEJIYATAR	SELL	1256	4
KSHITIJPOL	SATISH MEJIYATAR	BUY	2050	4
LUMINO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1733	111
LUMINO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1740	111
LUMINO	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	1621	110
LUMINO	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	1828	111
MARSONS	ARIHANT CAPITAL MARKETS LIMITED	SELL	1182	130
MARSONS	ARIHANT CAPITAL MARKETS LIMITED	BUY	1295	129
MAZDA	CROLL REYNOLDS INTERNATIONAL INC	SELL	150	261
MOS	ASHOK INVESTORS TRUST LIMITED	SELL	18992	5
MOS	MEGHA AGRAWAL	BUY	1480	5
MOS	PRAVIN KUMAR AGRAWAL	BUY	1808	6
MOS	PRITI ROSHAN AGRAWAL	BUY	1880	5
MOS	ROSHAN AGRAWAL	BUY	1832	6
MOS	SHRI BAJRANG COMMODITY	BUY	7200	5
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	BUY	11250	19
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	SELL	11781	19
MOTISONS	HRTI PRIVATE LIMITED	BUY	5663	18
MOTISONS	HRTI PRIVATE LIMITED	SELL	6107	18
MOTISONS	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	6426	18
MOTISONS	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	6507	18
MOTISONS	QE SECURITIES LLP	BUY	6997	19
MOTISONS	QE SECURITIES LLP	SELL	7128	18
MRIL	NEOMILE GROWTH FUND-SERIES I	BUY	155	84
MVELECTRO	HRTI PRIVATE LIMITED	BUY	221	814
MVELECTRO	HRTI PRIVATE LIMITED	SELL	249	813
MVELECTRO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	216	816
MVELECTRO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	216	816
PAISALO	OCTASPACE REALCON PRIVATE LIMITED	SELL	2299	90
PAISALO	OCTASPACE REALCON PRIVATE LIMITED	BUY	4588	90
PINELABS	VANGUARD EMERGING MARKETS STOCK INDEX FUND A	BUY	8235	192
PINELABS	VANGUARD TOTAL INTERNATIONAL STOCK INDEX FUND	BUY	8533	192
RAMBHAJO	NAVRATRI SHARE TRADING PRIVATE LIMITED	BUY	345	284
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	BUY	1180	313
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	SELL	1250	317
RATNAVEER	HRTI PRIVATE LIMITED	BUY	459	309
RATNAVEER	HRTI PRIVATE LIMITED	SELL	489	311
RATNAVEER	INFINITE DERIVATIVES LLP	SELL	500	310
RATNAVEER	QE SECURITIES LLP	BUY	695	316
RATNAVEER	QE SECURITIES LLP	SELL	697	308
RCDL-RE	ALPESH VAGHAJIBHAI VORA	BUY	531	2
RCDL-RE	AURIS VENTURES	BUY	330	2
RCDL-RE	RAJGOR PARESHKUMAR	SELL	225	3
RCDL-RE	RAJGOR ZENISHABEN ANILKUMAR	SELL	546	2
RENTOMOJO	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	1283	532
RENTOMOJO	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	1283	532
RENTOMOJO	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	634	532
RENTOMOJO	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	638	533
RENTOMOJO	IRAGE BROKING SERVICES LLP	SELL	668	532

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Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
RENTOMOJO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	702	531
RENTOMOJO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	725	531
RENTOMOJO	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRI	SELL	591	540
RENTOMOJO	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRI	BUY	591	539
RENTOMOJO	MICROCURVES TRADING PRIVATE LIMITED	BUY	662	535
RENTOMOJO	MICROCURVES TRADING PRIVATE LIMITED	SELL	662	535
RENTOMOJO	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	667	534
RENTOMOJO	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	667	534
RENTOMOJO	PLUTUS RESEARCH PRIVATE LIMITED	SELL	660	527
RENTOMOJO	PLUTUS RESEARCH PRIVATE LIMITED	BUY	670	527
RENTOMOJO	PURE BROKING PRIVATE LIMITED	BUY	744	523
RENTOMOJO	PURE BROKING PRIVATE LIMITED	SELL	753	524
RIR	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	651	207
RIR	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	651	207
RIR	IRAGE BROKING SERVICES LLP	BUY	396	208
RIR	IRAGE BROKING SERVICES LLP	SELL	418	209
RIR	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	537	206
RIR	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	539	206
RIR	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	698	206
RIR	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	698	206
RIR	QE SECURITIES LLP	SELL	602	206
RIR	QE SECURITIES LLP	BUY	608	206
SHANKARA	GEOMETRIC SECURITIES AND ADVISORY PRIVATE LIMITEI	BUY	0	149
SHANKARA	GEOMETRIC SECURITIES AND ADVISORY PRIVATE LIMITEI	SELL	132	149
SHANKARA	RAJASTHAN GLOBAL SECURITIES PVT LTD	BUY	351	149
SHAREINDIA	HRTI PRIVATE LIMITED	SELL	1511	226
SHAREINDIA	HRTI PRIVATE LIMITED	BUY	1645	226
SHAREINDIA	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1693	226
SHAREINDIA	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1694	227
SHAREINDIA	QE SECURITIES LLP	BUY	1297	227
SHAREINDIA	QE SECURITIES LLP	SELL	1308	226
SIGACHI	SPDR PORTFOLIO EMERGING MARKETS ETF	SELL	3733	30
SJS	VANGUARD EMERGING MARKETS STOCK INDEX FUND A	BUY	198	2426
SJS	VANGUARD TOTAL INTERNATIONAL STOCK INDEX FUND	BUY	199	2426
SKFINDUS	VANGUARD EMERGING MARKETS STOCK INDEX FUND A	BUY	254	2985
SKFINDUS	VANGUARD TOTAL INTERNATIONAL STOCK INDEX FUND	BUY	261	2985
SKYTECH	KAMAL KUMAR KABRA	SELL	134	25
SKYTECH	KARTHIK UPPALA	BUY	192	23
SKYTECH	YASHIV HOLDINGS PRIVATE LIMITED	BUY	53	25
SKYWAYS	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	3982	130
SKYWAYS	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	3982	130
SKYWAYS	HRTI PRIVATE LIMITED	SELL	2132	129
SKYWAYS	HRTI PRIVATE LIMITED	BUY	2144	129
SKYWAYS	IMC INDIA SECURITIES PRIVATE LIMITED	SELL	781	130
SKYWAYS	IMC INDIA SECURITIES PRIVATE LIMITED	BUY	785	129
SKYWAYS	IRAGE BROKING SERVICES LLP	BUY	1024	129
SKYWAYS	IRAGE BROKING SERVICES LLP	SELL	1247	130

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
SKYWAYS	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	1301	130
SKYWAYS	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	6266	129
SKYWAYS	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	6283	130
SKYWAYS	MARWADI SHARES AND FINANCE LTD.	BUY	1031	130
SKYWAYS	MARWADI SHARES AND FINANCE LTD.	SELL	1031	129
SKYWAYS	MATHISYS QUANTCAP LLP	SELL	734	130
SKYWAYS	MATHISYS QUANTCAP LLP	BUY	739	129
SKYWAYS	MICROCURVES TRADING PRIVATE LIMITED	BUY	3996	129
SKYWAYS	MICROCURVES TRADING PRIVATE LIMITED	SELL	3996	130
SKYWAYS	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1988	129
SKYWAYS	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1988	129
SKYWAYS	QE SECURITIES LLP	BUY	3782	129
SKYWAYS	QE SECURITIES LLP	SELL	3890	129
SKYWAYS	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	954	129
SKYWAYS	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	954	130
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	SELL	125	400
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	BUY	200	399
TEJA	ABUNDANTIA CAPITAL VCC - ABUNDANTIA CAPITAL III	BUY	60	235
VEEGALAND	ASTORNE CAPITAL VCC ARVEN	BUY	1385	154
VEEGALAND	CHITTILAPPILLY THOMAS KOCHUOUSEPH	BUY	800	146
VEEGALAND	KUBER INDIA OPPORTUNITY FUND	SELL	293	154
VEEGALAND	LRSD SECURITIES PRIVATE LIMITED	SELL	385	149
VEEGALAND	NEO APEX SHARE BROKING SERVICES LLP	BUY	300	146
VENUSPIPES	HRTI PRIVATE LIMITED	BUY	55	2225
VENUSPIPES	HRTI PRIVATE LIMITED	SELL	107	2236
VIJIFIN	NEO APEX SHARE BROKING SERVICES LLP	BUY	1072	14
WELENT	AUTHUM INVESTMENT & INFRASTRUCTURE LIMITED	SELL	734	780

Block Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
ENTERO	HDFC MUTUAL FUND	BUY	1,390	1,220
ENTERO	PRASID UNO FAMILY TRUST	SELL	1,222	1,220
ENTERO	PRASID UNOFAMILY TRUST	SELL	168	1,220
TMCV	BANK OF AMERICA NATIONAL ASSOCIATION	SELL	707	1,220
TMCV	BOFA SECURITIES EUROPE SA	BUY	707	1,220

Global Macro Events

Event	Previous	Forecast
USA		
Fed Goolsbee Speech		
Chicago Fed National Activity Index AUG	-8.00%	20.00%
3-Month Bill Auction	3.97%	4.00%
6-Month Bill Auction	4.06%	
Great Britain		
China		
Loan Prime Rate 5Y SEP	3.50%	3.50%
Loan Prime Rate 1Y	3.00%	3.00%
Denmark		
11-Month Bubill Auction	2.65%	4.00%
5-Month Bubill Auction	2.49%	0.50%
India		
Infrastructure Output YoY AUG	5.40%	5.50%

Daily Updates

Nifty Spot – Pivot Levels 21/09/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	23346.40	23291	23237	23190	23394	23443	23500

Previous week it was mentioned that, **Our view is Sell on Rise & below 23231 traders should use (22381-21300) levels as an opportunity to buy. If the trend is strong Nifty will bounce back from 22381 levels, any close below should be treated as negative for the current uptrend. Currently, (23966-24422)-24791-(25160-25685) as sell areas. If sustain above 25685 we open for 26347 and later further to 26500-26700 area.**

Nifty crossed below 23231 (previous week low) and slipped further marking a low of 23116.10. However, buying interest emerged at lower levels, leading to a bounce-back as the index recovered from the day's low and rallied upwards to mark a high of 23389.15. Thereafter, the index witnessed some profit booking at higher levels and closed at 23346.40. The recovery from lower levels indicates that buying support is emerging around the 23100-23200 zone, while the ability to sustain above the recent recovery levels will remain important for further momentum.

Below 23116 (current week low), we have support levels at (22381-21300) as bounce back levels.
If the trend is strong Nifty will bounce back from 22381 levels, any close below should be treated as negative for the current uptrend. As of now, (23877-24350)-24733-(25115-25660) as sell level areas.
If sustain above 25660 we open for 26347 and later further to 26500-26700 area.

Our view is Sell on Rise & below 23116 traders should use (22381-21300) levels as an opportunity to buy. If the trend is strong Nifty will bounce back from 22381 levels, any close below should be treated as negative for the current uptrend. Currently, (23877-24350)-24733-(25115-25660) as sell areas. If sustain above 25660 we open for 26347 and later further to 26500-26700 area.

The 200 SMA is at 24487.31.

Bank Nifty Spot – Pivot Levels 21/09/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Bank Nifty	56358.70	56121	55885	55700	56545	56733	56970

Previous week it was mentioned, **Our view is Sell on Rise & below 55699 traders should use 56393-(54733-53074) levels as an opportunity to buy. If the trend is strong Bank Nifty will bounce back from 54733 levels, any close below should be treated as negative for the current uptrend. Currently, (57133-58018)-58733-(59448-60466) as sell level areas. If sustain above 60466 we open for 61765 and later further to (62540-63470) area.**

Bank Nifty opened at 56884.25 and witnessed selling pressure, slipping downward to mark a low of 55794.75. However, the index did not breach the 55699 (previous week low) & respected this crucial support zone. Thereafter, buying interest emerged at lower levels, triggering a pullback rally that lifted Bank Nifty to a high of 56570.45.
The recovery from the lower levels indicates support-based buying, with the index regaining momentum after holding above the previous low. However, some profit booking was observed at higher levels & Bank Nifty finally closed at 56358.70.
Below 55794 (current week low), we have support levels at (54733-53074) as bounce back levels. If the trend is strong Bank Nifty will bounce back from 54733 levels, any close below should be treated as negative for the current uptrend. As of now, (57133-58018)-58733-(59448-60466) as sell level areas.
If sustain above 60466 we open for 61765 and later further to (62540-63470) area.

Our view is Sell on Rise & below 55794 traders should use (54733-53074) levels as an opportunity to buy. If the trend is strong Bank Nifty will bounce back from 54733 levels, any close below should be treated as negative for the current uptrend. Currently, (57133-58018)-58733-(59448-60466) as sell level areas. If sustain above 60466 we open for 61765 and later further to (62540-63470) area.

The 200 SMA is at 57309.21.

All the calls/opinions are subject to Disclosures and Disclaimer http://goo.gl/8bCMyQ

Daily Updates

Max Healthcare Institute Ltd – Technical Stock Call – 21/09/2026

Technical Stock Call	Action	CMP	Target	Support	SL
MAXHEALTH	BUY	1049.30	1188	(1034-1022)-1014-(1006-994)	980

Sector: Healthcare - Hospitals & Healthcare Services (INE027H01010)

About: **Max Healthcare Institute Ltd.** is one of India's largest multi-specialty hospital chains, providing primary, secondary, tertiary, and quaternary healthcare services. Headquartered in New Delhi/Gurugram, the company operates 21 hospitals with 6,100+ beds across North and West India, along with Max Labs (diagnostics) and Max@Home (home healthcare).

View – Medium Term Bullish

The stock commenced its downtrend from 1135.9 (JUL 26).

Stock started trading below the averages & forming lower tops gradually reached a low of 981.1 (AUG 26). During the correction phase, the stock breached 200 SMA & later, extended its decline marking a low around 981 levels.

The stock attracted buying interest at lower levels & commenced its up move, but faced resistance near 200 SMA & witnessed a minor correction reaching a low of 974 (SEP 26).

Again, buying interest emerged at lower levels leading to a gradual recovery & recently, after forming higher bottoms, the stock has given a **Descending Triangle – Bullish Breakout** on the daily chart supported by volumes with a bullish candle reaching to a high of 1059.9 (SEP 26), which is higher than the previous swing highs.

Indicators like MACD, PVT & RSI suggests positive crossover. The stock is trading above 200 SMA.

Target of **1188** is expected with lower support levels at **(1034-1022)-1014-(1006-994)** in case of intermediate fall.

A stop loss at **980** is to be followed for the trade.

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Daily Updates

Aegis Logistics Ltd – Technical Stock Call – 21/09/2026

Technical Stock Call	Action	CMP	Target	Support	SL
AEGISLOG	BUY	1415.40	2100	(1371-1335)-1307-(1278-1261)	1185

Sector: Energy - Oil & Gas Logistics (INE208C01025)

About: **Aegis Logistics Ltd.** is India's leading integrated oil, gas, and chemical logistics company, specializing in the import, storage, handling, and distribution of LPG, petroleum products, and chemicals. Established in 1956 and headquartered in Mumbai, it is one of the country's largest private LPG importers and terminal operators.

View – Long Term Bullish

Primary move in stock commenced from705 (May 2026). Uptrend followed, and the stock made a high of 1498(AUG 1026). Profit booking followed & the Stock corrected to 1180(SEPT 2026). During its uptrend the stock continuously kept taking support of the averages. Super trend also is in Positive mode since May 2026. **200 SMA** is also in rising mode.
The stock consolidated in the range of 1150 to 1450 for almost two months. Recently, after consolidation the stock has given a **Range & Symmetrical triangle pattern breakout** with positive price candle supported by volume making a high of 1429.70.
William % R, Stochastic Momentum Index& MACD suggest Positive uptrend.
Probability of Further Up Move is very high.
Target of **2100** is expected with lower support levels at **(1371-1335)-1307-(1278-1261)** case of intermediate fall.
A stop loss at **1185** is to be followed for the trade.

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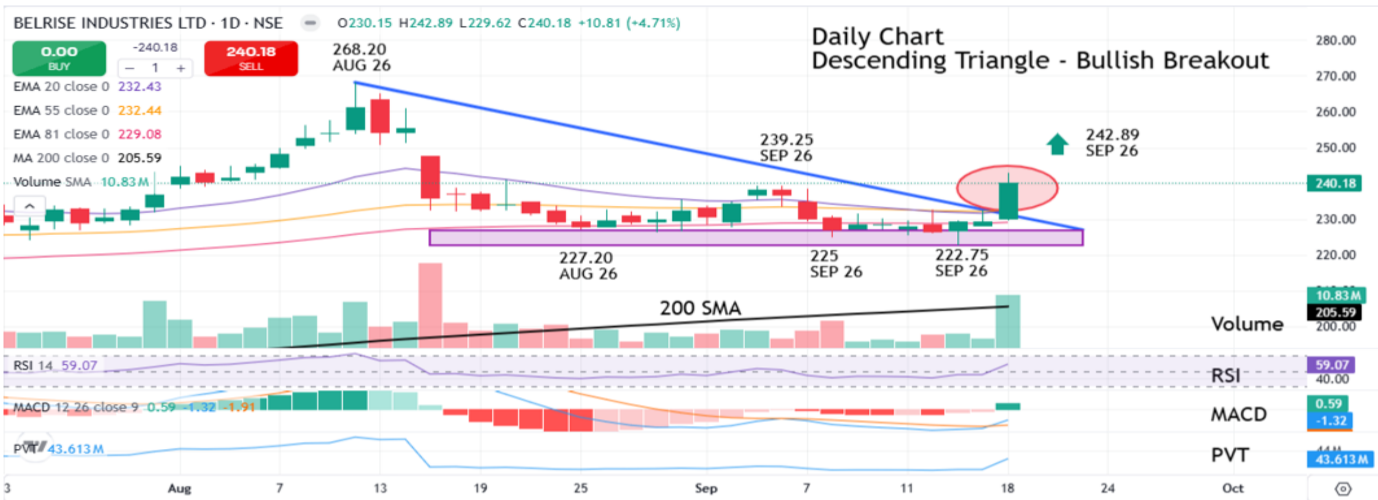
Daily Updates

Belrise Industries Ltd – Technical Stock Call – 21/09/2026

Technical Stock Call	Action	Reco	Target	Support	SL
BELRISE	BUY	240.18	272	(236-231-226)	222



Sector: Automobile (INE894V01022)

About: **Belrise Industries Ltd.** is one of India's leading Tier-1 automotive component manufacturers, specializing in chassis systems, suspension systems, polymer components, exhaust systems, and precision engineering products. Headquartered in Pune, the company supplies critical components to major 2W, 3W, passenger vehicle, commercial vehicle, and EV OEMs across India and global markets.

View – Short Term Bullish

The stock commenced its downtrend from 268.20 (AUG 26).

Stock started trading below the averages & forming lower tops gradually reached a low of 227.20 (AUG 26).

The stock attracted buying interest at lower levels & commenced its up move rallied to mark a high of 239.25 (SEP 26), but faced resistance in that area & witnessed a minor correction reaching a low of 222.75(SEP 26).

As observed on charts, the stock has formed a well-defined base at 225 levels suggesting bounce back & support on each corrective move.

Again, buying interest emerged at lower levels leading to a gradual recovery & recently, after forming higher bottoms, the stock has given a **Descending Triangle – Bullish Breakout** on the daily chart supported by volumes with a bullish candle reaching to a high of 242.89 (SEP 26), which is higher than the previous swing highs.

Indicators like MACD, PVT & RSI suggests positive crossover. The stock is trading above 200 SMA.

Target of **272** is expected with lower support levels at **(236-231-226)** in case of intermediate fall.
A stop loss at **222** is to be followed for the trade.

Stock specific news

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

Canara Bank: ₹2,042 Crore Bonds Issued
Confirmed raising ₹2,042 crore through Basel III-compliant Additional Tier I bonds.The bonds carry a coupon of 8.10%.The issuance took place on 18 September 2026. Source

Gujarat Themis Biosyn: Japan Acquisition Completed
Completed the acquisition of Japan's MBJ.The transaction involved an equity investment of ₹475 crore.It also involved ₹745 crore of loan funding, taking the two components to ₹1,220 crore. Source

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

Federal Bank: Dollar Funding Programme Established
Established a US$500 million medium-term note programme.The programme provides for issuance of bonds and foreign-currency notes.The disclosure concerns establishment of the programme; it does not confirm that US$500 million has been raised. 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

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

Emami: ₹282 Crore Buyback Announced
Published details of a share buyback of up to ₹282 crore.The maximum announced buyback price is ₹475 per share.The public announcement follows the board's approval on 17 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

Highway Infrastructure: Gorakhpur Toll Contract Detailed
Detailed a ₹220.66 crore toll-operations contract awarded by UPEIDA.The contract covers the Gorakhpur Link Expressway for two years.The letter of award had previously been disclosed on 16 September. Source

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

Refex Industries: Ash Handling Contract Clarified
Disclosed an approximately ₹160 crore ash-lifting contract from a Madhya Pradesh public-sector undertaking.The corrected quantity is 10 lakh metric tonnes of pond ash and fly ash.The contract runs for 18 months; the clarification corrects the initial quantity disclosure. 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

Grasim Industries: Pulp Mill Idling Planned
Reported that 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

P N Gadgil Jewellers: US Subsidiary Investment Approved
Approved investment of up to US$6.5 million in its US wholly owned subsidiary.The same board meeting approved the PNG ESOP 2026 scheme.The board also approved the reappointment of Dr. Vaijayanti Pandit as a director. Source

NTPC Green Energy: Additional Renewable Capacity Operational
Declared 9.45 MW of the Vanki wind project commercially operational from 19 September 2026.The addition raised group commercial capacity to 10,920.53 MW.A separate disclosure reported 68.22 MW at Dahod solar, with commercial operation effective 23 July 2026. Source

Larsen & Toubro: Forty Semiconductor Products Unveiled
L&T Semiconductor Technologies unveiled 40 products at SEMICON 2026.The portfolio included the business's first silicon carbide chips.The announcement concerns product introductions; it did not establish a corresponding customer-order value. Source

Zodiac Energy: Four Solar Orders Secured
Announced receipt of four domestic solar purchase orders.The orders cover 24,760 kWp, equivalent to 24.76 MWp, of combined capacity.Execution is scheduled within six months. 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

Concord Biotech: USFDA Inspection Observation Reported
Reported completion of the USFDA inspection at Unit II, Valthera formulation facility.The inspection concluded on 18 September 2026.It resulted in one observation, described by the company as minor and procedural. Source

Haleos Labs: Subsidiary Clears FDA Inspection
Reported the outcome of the USFDA inspection at subsidiary Mahi Drugs.The inspection concluded on 18 September 2026.The facility received zero Form 483 observations. Source

Birla Corporation: Subsidiary Receives GST Notice
Subsidiary RCCPL received a GST show-cause notice.The notice concerns alleged input-tax-credit irregularities of ₹15.03 crore.The period covered is FY2022–23; this is a show-cause notice, not a confirmed final penalty. Source

QMS Medical: Saarathi Acquisition Completion Announced
Announced acquisition of the remaining 24% stake in Saarathi Healthcare.The consideration was approximately ₹14.23 crore, taking ownership to 100%.The acquisition had also been disclosed on 17 September; the subsequent press release is a follow-up. Source

Sky Gold & Diamonds: Jewellery Acquisition Receives Approval
Approved acquisition of 100% of Purvi Gems & Jewellery (India).The consideration is capped at ₹9 crore.Completion is targeted by 30 November 2026. Source

Power & Instrumentation: Maharashtra Solar Order Secured
Received an order worth ₹6.06 crore from Mahesh Solar Solution.The work relates to a KUSUM-C solar project.The project is located in Maharashtra. Source

Daily Updates

Macro / Non-Stock News

Friday Rebound Stays Fragile

Nifty 50 gained 75.8 points (+0.33%) to 23,346.40 on September 18, while Sensex slipped about 20 points (-0.03%) to 74,295 after unusual volatility during the closing auction. Both indices were positive before the closing-auction session, when indicative Sensex prices briefly dropped nearly 1,000 points. The divergence leaves the recovery technically fragile heading into Monday. (The Economic Times) Economic Times

Broader Markets Lead Recovery

Mid- and small-caps materially outperformed on Friday, with the Nifty Midcap 100 and Smallcap 100 gaining as much as 1.7%. The rebound was broad-based, but IT lagged on profit-taking and concerns that higher-for-longer global rates could restrain technology spending. On a weekly basis, healthcare and FMCG were the relatively resilient sectors as investors preferred defensive/domestic-demand exposure. (The Economic Times)

Domestic Flows Cushion FIIs

FIIs turned net buyers on Friday by about ₹600 crore, while DIIs bought ₹1,019.69 crore, providing near-term support. However, FIIs remained net sellers for the fifth consecutive week, offloading about ₹7,620 crore, against DII purchases of ₹11,232 crore. Cumulative foreign secondary-market selling remains the larger positioning risk for Monday. (The Economic Times) Economic Times

FPI Selling Remains Heavy

FPIs have withdrawn ₹20,974 crore from equities through September 18, while another NSDL-based measure showed ₹23,676 crore of secondary-market outflows through September 19. Higher crude, US yields and rupee weakness are being cited as the key drivers. Foreign investors also withdrew ₹10,296 crore through FAR debt, adding pressure to Indian rates and currency positioning. (Moneycontrol) Moneycontrol

Options Support At 23,300

Nifty PCR rose to 1.06 from 0.99, while maximum Put OI was at 23,300 with 1.26 crore contracts, followed by 23,000 at 1.09 crore. Maximum Call OI stood at 23,700 with 94.95 lakh contracts, making the 23,300–23,700 region the immediate derivatives range. India VIX fell 7.36% to 11.38, signalling lower near-term volatility despite weak macro conditions. (Moneycontrol) Moneycontrol

Crude Rebounds Above $104

Brent rose $0.81 (+0.78%) to $104.68/bbl early Monday, while WTI climbed $0.76 (+0.76%) to $101.06/bbl, after Houthi missile and drone attacks on Riyadh renewed Middle-East supply concerns. This reverses part of last week's crude relief and is directly negative for India's import bill, INR, inflation expectations and oil-sensitive sectors. (Reuters) Reuters

Russian Oil Tariff Risk

The new US Sanctioning Russia and Iran Act gives the US administration authority to impose tariffs of up to 100% on imports from major purchasers of Russian oil and gas, potentially including India and China. The measure takes effect within 30 days and materially raises uncertainty around India's Russian crude sourcing, external trade and bilateral US trade exposure. (Moneycontrol) Moneycontrol

Rupee Hovers Near 96

Fresh weekend FPI analysis highlighted the rupee near ₹95.92–95.96/$, after a 1.1% weekly depreciation, its sharpest weekly decline in four months, with the currency also breaching 96 intraday. High crude, foreign selling and the narrow India-US yield differential remain the principal pressures. Further INR weakness would favour exporters but raise imported inflation and input-cost risks. (Moneycontrol) Business Standard

US Yields Hold 5%

The US 10-year Treasury yield touched 5.041% during the week and finished around 5%, its first close at that level since 2007. The yield has risen for three consecutive weeks, tightening global financial conditions and increasing the relative opportunity cost of holding emerging-market assets. For India, this remains a key FPI-flow and equity-valuation headwind. (Moneycontrol) Moneycontrol

Fed Signals More Tightening

Fed policymaker Neel Kashkari said US inflation remains too high across the economy and supported last week's 25-bp hike to 3.75–4.00%. All but two Fed policymakers project at least one additional 25-bp increase this year, while futures imply roughly a two-in-three probability of ending 2026 at 4.00–4.25%. This reinforces the higher-for-longer risk for EM flows and valuations. (Reuters) Reuters

Disclosures and Disclaimer

Ventura Securities Limited - SEBI Registration No.: INH000001634

Corporate Office: I-Think Techno Campus, 8th Floor, ‘B’ Wing, Off Pokhran Road No 2, Eastern Express Highway, Thane (W) – 400608