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Daily Updates

Market Commentary

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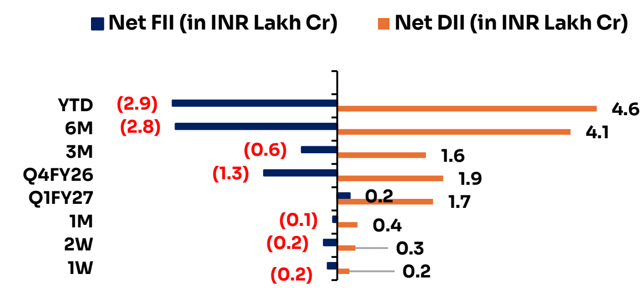
Overnight global action:

On 28th September 2026, US markets ended lower, with the S&P 500 declining by 59.5 pts (-0.77%), Dow Jones falling by 347.1 pts, and Nasdaq 100 declining by 331.3 pts (-1.08%). Gift Nifty declined by 7.5 pts, indicating a marginally negative opening for Indian markets.

NSE breadth remained positive with 869 advances against 2,716 declines, while BSE witnessed 1,271 advances versus 3,218 declines.

Fund Flow - 29th Sep 2026	Buy	Sell	Net
FII/FPI (INR Cr)	9,047.6	14,400.8	-5,353.2
DII (INR Cr)	15,918.3	10,729.3	5,189.0



Index Options Data Analysis:

Nifty OI peaks at 23,000 Calls and 22,000 Puts. PCR stands at 0.87.
Sensex OI peaks at 75,000 Calls and 68,000 Puts. PCR stands at 1.10.
Bank Nifty OI peaks at 57,500 Calls and 54,000 Puts. PCR stands at 1.23.

Securities in Ban for F&O Trade:

LICHSGFIN, SAIL

Sector Performance:

NIFTY MIDCAP 50 index declined by -1.52 % driven by DIXON(+1.87%), FEDERALBNK(+0.93%), HEROMOTOCO(+0.56%)

NIFTY MICROCAP 250 index declined by -1.59 % driven by OPTIMUS(+6.52%), AEQUS(+5.97%), KPIGREEN(+5.67%)

NIFTY SMALLCAP 250 index declined by -1.62 % driven by TTML(+5.05%), ELECON(+4.53%), GODIGIT(+4.43%)

NIFTY SMALLCAP 50 index declined by -1.89 % dragged by MANAPPURAM(-6.29%), CUB(-4.24%)

NIFTY SMALLCAP 100 index declined by -1.85 % dragged by MANAPPURAM(-6.29%), PWL(-4.80%), IFCI(-4.46%)

NIFTY MIDCAP SELECT index declined by -1.79 % dragged by YESBANK(-5.87%), INDUSTOWER(-3.91%), INDIANB(-3.55%)

Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	22,817	-0.03%	-13.16%	20.7
Sensex 30	72,772	-1.52%	-14.61%	19.0
Nifty 50	22,780	-1.56%	-12.82%	20.7
India VIX	14	13.10%	45.15%	
Nifty Bank	54,472	-1.99%	-8.58%	16.0
Nifty Next 50	70,310	-2.05%	1.36%	70.3
Nifty 500	22,232	-1.64%	-6.87%	20.9
Nifty Mid 100	59,914	-1.63%	-0.94%	30.8
Nifty Small 250	17,863	-1.63%	7.06%	30.1
USD/INR	95.9	0.00%	6.71%	
India 10Y	7.2%			
India 2Y	6.6%			
India 1Y	6.2%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,684	-0.77%	12.25%	33.3
Dow Jones	51,482	-0.67%	7.11%	24.9
Nasdaq 100	30,277	-1.08%	19.91%	49.7
FTSE 100	10,685	-0.10%	7.59%	16.9
CAC 40	8,078	0.01%	-0.87%	23.7
DAX	25,374	-0.13%	3.61%	26.5
Nikkei 225	65,377	-0.76%	29.80%	34.9
Hang Seng	24,643	0.54%	-3.85%	12.0
Shanghai Comp	3,824	-1.67%	-3.66%	17.3
KOSPI	6,863	-0.39%	63.02%	34.0
S&P/ASX 200	8,679	-0.01%	-0.49%	22.9

Stocks in the News

KALPATARU PROJECTS INTERNATIONAL (CMP: 1376, MARKET CAP: 23491 Cr., SECTOR: INFRASTRUCTURE EPC)

NSE Filing

Received a letter of award for a gas pipeline EPC project in the UAE.The estimated contract value is over ₹4,000 crore.The award adds an international gas infrastructure project to its order book.

MAN INFRACONSTRUCTION (CMP: 127, MARKET CAP: 5144 Cr., SECTOR: REAL ESTATE & CONSTRUCTION)

NSE Filing

Announced a partnership with Godrej Properties for its Marine Lines, Mumbai, project.The company indicated potential project revenue of over ₹6,000 crore.It also expects recovery of over ₹300 crore of investment through the arrangement; the ₹6,000 crore is a projection, not revenue already booked.

DILIP BUILDCON (CMP: 407, MARKET CAP: 6610 Cr., SECTOR: ROADS & EPC)

NSE Filing

Emerged as L1 bidder for a ₹1,151.47 crore 400-kV AIS transmission project at Yavatmal, with a 24-month construction period.It was also declared L1 for NHAI's ₹688.23 crore Solapur elevated corridor.The two quoted project values total ₹1,839.70 crore; L1 status precedes a final contract award.

NCC (CMP: 130, MARKET CAP: 8180 Cr., SECTOR: INFRASTRUCTURE EPC)

NSE Filing

Received a ₹1,076.71 crore order for the Anakapalli drinking-water supply project.The project is located in Andhra Pradesh.The stipulated execution period is 24 months.

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	26,525	-1.64%	-5.90%	21.8
Nifty IT	28,087	-0.26%	-25.86%	21.9
Nifty Fin Ser	24,672	-1.69%	-10.65%	16.1
Nifty Pharma	26,762	-0.89%	17.77%	44.0
Nifty Services	29,194	-1.42%	-13.26%	32.1
Nifty Cons Dur	38,163	-0.30%	3.83%	51.7
Nifty PSE	9,390	-1.91%	-4.70%	9.8
Nifty FMCG	45,264	-1.47%	-18.41%	31.2
Nifty Pvt Bank	26,476	-1.51%	-7.82%	9.9
Nifty PSU Bank	8,026	-3.24%	-5.94%	13.1
Nifty Cons	11,270	-1.27%	-8.29%	39.8
Nifty Energy	36,693	-2.00%	3.87%	11.6
Nifty Health	16,537	-0.85%	12.96%	39.6
Nifty India Mfg	15,641	-1.52%	1.48%	29.1
Nifty Metal	12,854	-1.78%	15.10%	23.0
Nifty Oil & Gas	10,661	-1.86%	-12.84%	16.3

Derivatives Position (Combined)

Stock	% Chg OI	%Chg LTP
Long		
BLUESTARCO	5.8	0.8
PREMIERENE	2.9	0.9
LAURUSLABS	1.4	0.5
LTM	1.3	0.5
IREDA	0.5	1.5
Short		
FORCEMOT	11.9	-1.3
GODFRYPHLP	11.5	-2.2
ICICIBANK	8.7	-2.1
BDL	7.8	-2.2
RVNL	7.4	-1.9
Long Unwinding		
ASTRAL	-12.5	-2.0
MFSL	-10.6	-0.4
KFINTECH	-10.5	-1.0
ANGELONE	-8.7	-3.3
SWIGGY	-8.5	-3.6
Short Covering		
KAYNES	-9.4	0.8
LICHSFIN	-4.2	0.1
OFSS	-3.8	0.6
VOLTAS	-2.5	1.3
PETRONET	-2.3	0.6

ANUPAM RASAYAN INDIA (CMP: 1187, MARKET CAP: 13515 Cr., SECTOR: SPECIALTY CHEMICALS)

NSE Filing

Completed the acquisition of a 48.2% stake in Bliss GVS Pharma at ₹299 per share.A separate acquisition update reports its holding at 50.07% following an additional purchase of approximately ₹162.74 crore.The completed transactions give Anupam Rasayan a controlling stake in the pharmaceutical company.

Commodities	CMP	1D	YTD
Gold ($)	4,120	0.11%	-4.77%
Silver ($)	60.7	0.20%	-16.1%

Currency	CMP	1D	YTD
USD/INR	95.9	0.00%	6.71%
EUR/INR	109.9	-0.02%	3.03%
GBP/INR	127.1	-0.05%	5.00%
JPY/INR	0.6	0.06%	6.37%
EUR/USD	1.1	-0.04%	-3.26%

Securities Lending & Borrowing Scheme

Company	Under.Ltp	Fut.Ltp	Spread (%)
ICICIPRULI	458.70	449.65	1.97
TIINDIA	2,459.00	2,417.60	1.68
BAJAJHLDNG	10,800.00	10,664.00	1.26
DABUR	385.75	381.20	1.18
BHEL	411.90	407.75	1.01

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
ZYDUSLIFE	1,215	1,229	1,209	25-Sep-26
WELCORP	2,754	2,838	2,838	25-Sep-26
ENGINERSIN	313	321	319	25-Sep-26
SHREEJISPG	747	762	754	25-Sep-26
DYNAMATECH	13,200	13,500	13,287	25-Sep-26

52 Week Low

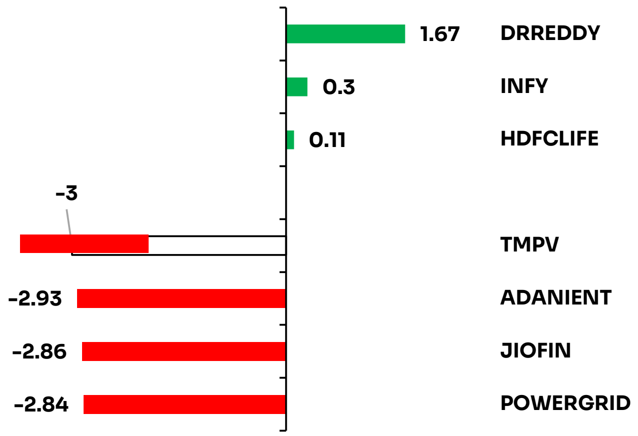
Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
RELIANCE	1,198	1,197	1,211	25-Sep-26
HINDUNILVR	1,896	1,893	1,915	25-Sep-26
MARUTI	12,008	11,944	11,975	25-Sep-26
WIPRO	162	161	162	25-Sep-26
JIOFIN	221	219	223	30-Mar-26

Volume Shockers

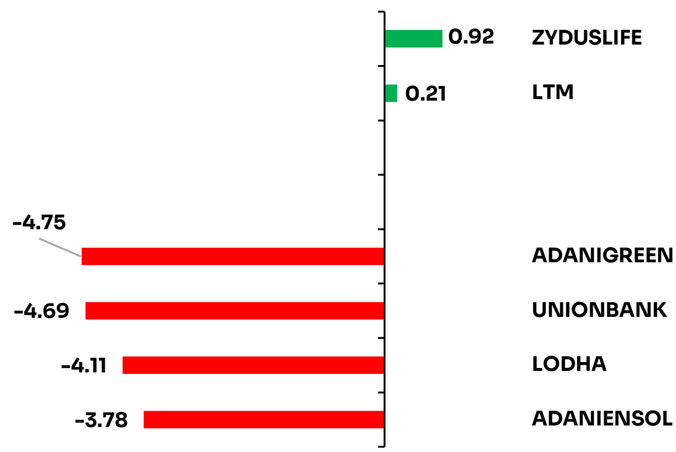
Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
BANK10BETF	2,487	5	6	20
RSYSTEMS	61,311	157	153	283
IWP	894	4	6	41
INDOBORAX	8,226	41	57	482
GSEC10ABSL	1	0	0	112
ARYAMAN	30	0	0	625
DAMCAPITAL	18,845	158	178	160
PFS	39,757	509	454	27
SECLEDBETA	3,665	54	48	14
TTML	79,429	1,182	1,705	36
NIF500BETA	1,127	19	18	36
MOQUALITY	40	1	1	192
SHRIKRISH	4	0	0	36
STARTECK	15	0	0	315
RHETAN	66,656	1,689	1,075	16
JINDRILL	7,025	184	220	621
BBETF0432	25	1	1	1,333
ELECTCAST	38,417	1,165	1,284	72
KRISHIVAL	211	7	10	414
IVZBANKNF	32	1	5	54
SMCGLOBAL	26,689	1,008	995	97
CLEANMAX	15,272	634	446	1,365
RHL	30	2	4	164
BPLPHARMA	156	9	5	2,150
RTSPOWR	114	7	4	126

Top Gainers & Losers

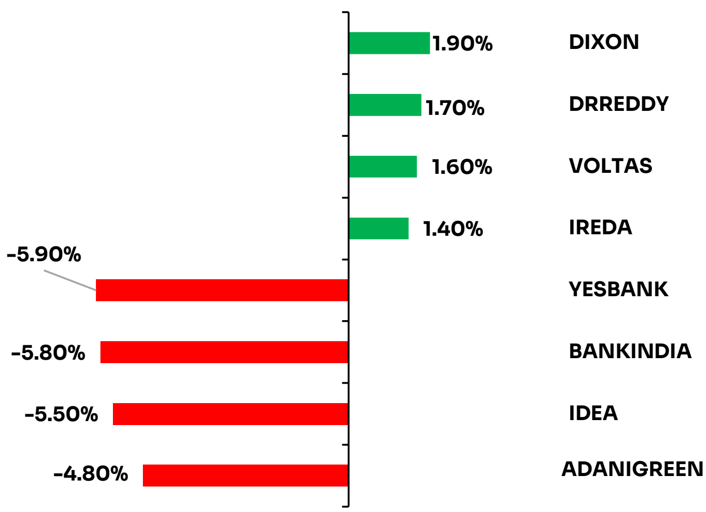
Nifty 50



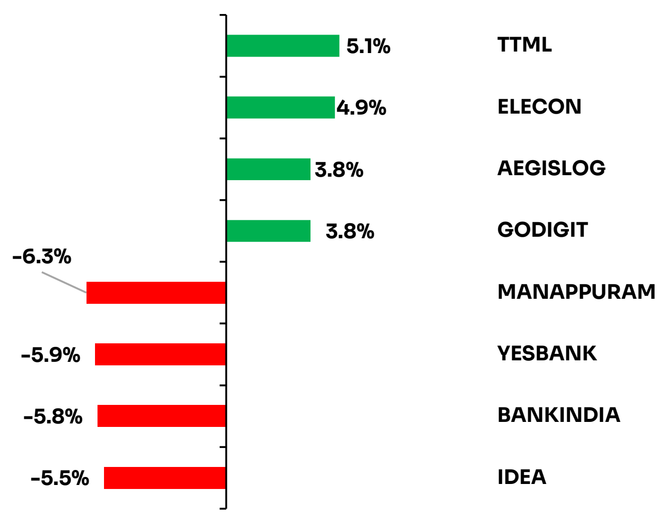
Nifty Next 50



Nifty 200



Nifty 500



Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
AASTHA	QE SECURITIES LLP	SELL	268	39
AASTHA	QE SECURITIES LLP	BUY	272	39
ADSL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	352	121
ADSL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	352	121
AGIIL	ARIHANT CAPITAL MARKETS LIMITED	SELL	1084	271
AGIIL	ARIHANT CAPITAL MARKETS LIMITED	BUY	1087	271
ATALREAL	HRTI PRIVATE LIMITED	BUY	707	13
ATALREAL	HRTI PRIVATE LIMITED	SELL	819	13
BLISSGVS	ANUPAM RASAYAN INDIA LIMITED	BUY	2250	723
CLEANMAX	AUGMENT INDIA I HOLDINGS LLC	SELL	869	1288
CLEANMAX	AUGMENT INDIA I HOLDINGS LLC	SELL	7633	1289
CLEANMAX	GOLDMAN SACHS INVESTMENTS MAURITIUS I LIMITED	BUY	719	1289
CLEANMAX	HSBC INDIA INFRASTRUCTURE EQUITY MOTHER FUND	BUY	788	1288
CLEANMAX	ICICI PRUDENTIAL LIFE INSURANCE COMPANY LIMITED	BUY	1115	1288
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	BUY	136	284
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	SELL	267	285
COMSYN	CRABEL VINTRADE PRIVATE LIMITED	BUY	322	281
CUBEXTUB	TAJUDDIN DASTAGIR PATHAN	SELL	75	161
DAMCAPITAL	BLITZQUANT RESEARCH LLP	SELL	460	152
DAMCAPITAL	BLITZQUANT RESEARCH LLP	BUY	460	152
DAMCAPITAL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	613	154
DAMCAPITAL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	614	154
DAMCAPITAL	MICROCURVES TRADING PRIVATE LIMITED	SELL	486	156
DAMCAPITAL	MICROCURVES TRADING PRIVATE LIMITED	BUY	486	156
DAMCAPITAL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	994	154
DAMCAPITAL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	994	154
DAMCAPITAL	QE SECURITIES LLP	BUY	394	152
DAMCAPITAL	QE SECURITIES LLP	SELL	397	152
DAMCAPITAL	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	396	155
DAMCAPITAL	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	396	154
DEEPA	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	734	205
DEEPA	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	734	205
DEEPA	HRTI PRIVATE LIMITED	BUY	527	204
DEEPA	HRTI PRIVATE LIMITED	SELL	570	207
DEEPA	QE SECURITIES LLP	SELL	935	207
DEEPA	QE SECURITIES LLP	BUY	969	204
ELECTCAST	ASHA KEJRIWAL	BUY	5594	71
ELECTCAST	BELGRAVE INVESTMENT FUND	SELL	10149	72
ELECTCAST	BELGRAVE INVESTMENT FUND	SELL	18762	71
ELECTCAST	MAYANK KEJRIWAL	BUY	8343	71
ELECTCAST	WILCOX MERCHANTS PRIVATE LIMITED	BUY	4825	71
FERMENTA	ANANT JAIN	BUY	232	474
FERMENTA	MOLECULE VENTURES LIMITED LIABILITY PARTNERSHIP	BUY	257	475
FERMENTA	THAKKAR PREETI	SELL	1166	475
GLASSWALL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	856	273
GLASSWALL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	856	270
GLASSWALL	PLUTUS WEALTH MANAGEMENT LLP	SELL	567	273
GLASSWALL	PLUTUS WEALTH MANAGEMENT LLP	BUY	567	273
GNRL	ACHINTYA SECURITIES LIMITED	SELL	1000	98
HEROMOTORS	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	3649	135

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
HEROMOTORS	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	3649	135
HEROMOTORS	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	3649	135
HEROMOTORS	BLITZQUANT RESEARCH LLP	SELL	3234	134
HEROMOTORS	BLITZQUANT RESEARCH LLP	BUY	3234	134
HEROMOTORS	IRAGE BROKING SERVICES LLP	BUY	2716	135
HEROMOTORS	IRAGE BROKING SERVICES LLP	SELL	4905	136
HEROMOTORS	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	5114	135
HEROMOTORS	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	5114	137
HEROMOTORS	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	3087	135
HEROMOTORS	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	3135	135
HEROMOTORS	MATHISYS QUANTCAP LLP	BUY	2293	136
HEROMOTORS	MATHISYS QUANTCAP LLP	SELL	2318	135
HEROMOTORS	NEO APEX SHARE BROKING SERVICES LLP	BUY	3355	129
HEROMOTORS	NEO APEX SHARE BROKING SERVICES LLP	SELL	3356	131
HEROMOTORS	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	2717	136
HEROMOTORS	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	2717	136
HEROMOTORS	SETU SECURITIES PVT LTD	BUY	2843	131
HEROMOTORS	SETU SECURITIES PVT LTD	SELL	2843	132
HTEL	ASHIKA GLOBAL FINANCE PRIVATE LIMITED	SELL	566	64
INDOBORAX	IRAGE BROKING SERVICES LLP	BUY	275	489
INDOBORAX	IRAGE BROKING SERVICES LLP	SELL	276	489
INDOBORAX	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	337	487
INDOBORAX	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	337	488
INDOBORAX	MICROCURVES TRADING PRIVATE LIMITED	BUY	603	489
INDOBORAX	MICROCURVES TRADING PRIVATE LIMITED	SELL	603	490
INDOBORAX	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	369	489
INDOBORAX	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	369	489
INDOBORAX	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	189	490
INDOBORAX	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	189	490
JINDRILL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	152	626
JINDRILL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	152	627
JINDRILL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	159	631
JINDRILL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	164	628
JINDRILL	IRAGE BROKING SERVICES LLP	SELL	144	627
JINDRILL	IRAGE BROKING SERVICES LLP	BUY	173	631
JINDRILL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	275	627
JINDRILL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	275	627
JINDRILL	MICROCURVES TRADING PRIVATE LIMITED	BUY	482	629
JINDRILL	MICROCURVES TRADING PRIVATE LIMITED	SELL	482	629
JINDRILL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	220	626
JINDRILL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	220	625
JINDRILL	QE SECURITIES LLP	SELL	149	624
JINDRILL	QE SECURITIES LLP	BUY	165	624
KRISHIVAL	NJD CAPITAL PRIVATE LIMITED	SELL	200	414
LAMOSAIC	NOPEA CAPITAL SERVICES PRIVATE LIMITED	SELL	81	51
LAMOSAIC	NRIP JAIN	BUY	61	51
LAMOSAIC	YOGESH PRASANLAL DAGLI	BUY	80	50
MAGSON	JENNIFER RAJESH FRANCIS	SELL	111	180
MAGSON	KRISHNA AWTAR KABRA	BUY	189	180

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
MAMATA	MAMATA GROUP CORPORATE SERVICES LLP	SELL	580	401
MAMATA	RIDDHESH GIRISHBHAI BHANDARI	BUY	147	401
MAMATA	SANDIPKUMAR P. JAIN	BUY	250	401
MANIKA	EQUISM CAPITAL PRIVATE LIMITED	BUY	610	42
OLIL	RAJAN SHIVRAM MOTE	BUY	59	421
ONELIFECAP	YMS CONSULTANTS LIMITED	BUY	189	37
PAISALO	OCTASPACE REALCON PRIVATE LIMITED	BUY	6533	82
PROTEAN	HRTI PRIVATE LIMITED	BUY	243	697
PROTEAN	HRTI PRIVATE LIMITED	SELL	243	699
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	BUY	1095	332
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	SELL	1168	332
RATNAVEER	CRABEL VINTRADE PRIVATE LIMITED	BUY	21	331
RATNAVEER	CRABEL VINTRADE PRIVATE LIMITED	SELL	678	332
RATNAVEER	GOLDEN GOENKA MANAGEMENT CONSULTANCY SERVI	SELL	620	330
RAYMOND	HRTI PRIVATE LIMITED	BUY	400	1188
RAYMOND	HRTI PRIVATE LIMITED	SELL	413	1195
RAYMOND	QE SECURITIES LLP	BUY	370	1193
RAYMOND	QE SECURITIES LLP	SELL	371	1196
RHETAN	JAGID VANITABEN RAJENDRAPRASAD	BUY	9430	15
RHETAN	JAGID VANITABEN RAJENDRAPRASAD	SELL	10497	16
RHETAN	PANCHAL HIREN JAGDISHBHAI	SELL	8000	15
RHETAN	PRIJAL TRADEFIN LLP	SELL	4100	15
RHETAN	PRIJAL TRADEFIN LLP	BUY	4200	15
RHETAN	RATHOD YUVRAJSINH	SELL	6910	14
RHETAN	SHIVAM VIRENDRA SHARMA	SELL	5100	14
RSYSTEMS	BLITZQUANT RESEARCH LLP	BUY	1323	266
RSYSTEMS	BLITZQUANT RESEARCH LLP	SELL	1323	266
RSYSTEMS	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	SELL	624	268
RSYSTEMS	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	BUY	648	267
RSYSTEMS	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	1001	267
RSYSTEMS	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	1014	267
RSYSTEMS	IMC INDIA SECURITIES PRIVATE LIMITED	BUY	783	265
RSYSTEMS	IMC INDIA SECURITIES PRIVATE LIMITED	SELL	783	265
RSYSTEMS	IRAGE BROKING SERVICES LLP	SELL	908	267
RSYSTEMS	IRAGE BROKING SERVICES LLP	BUY	911	267
RSYSTEMS	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1280	266
RSYSTEMS	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1290	266
RSYSTEMS	MICROCURVES TRADING PRIVATE LIMITED	BUY	4089	266
RSYSTEMS	MICROCURVES TRADING PRIVATE LIMITED	SELL	4089	267
RSYSTEMS	MUSIGMA SECURITIES	BUY	1631	267
RSYSTEMS	MUSIGMA SECURITIES	SELL	1632	267
RSYSTEMS	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	2192	266
RSYSTEMS	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	2192	266
RSYSTEMS	QE SECURITIES LLP	BUY	1302	267
RSYSTEMS	QE SECURITIES LLP	SELL	1305	265
RSYSTEMS	VINSUL MAKARDI LTD	SELL	638	265
RSYSTEMS	VINSUL MAKARDI LTD	BUY	638	265
SBC	HRTI PRIVATE LIMITED	SELL	2560	55
SBC	HRTI PRIVATE LIMITED	BUY	2959	55
SDBL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	986	80

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
SDBL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	986	80
SDBL	PLUTUS WEALTH MANAGEMENT LLP	BUY	1176	80
SDBL	PLUTUS WEALTH MANAGEMENT LLP	SELL	1176	80
SENCO	VISION AHEAD SERVICES PRIVATE LIMITED	SELL	1000	315
SHANTIGOLD	HRTI PRIVATE LIMITED	BUY	406	310
SHANTIGOLD	HRTI PRIVATE LIMITED	SELL	437	311
SHANTIGOLD	QE SECURITIES LLP	SELL	539	311
SHANTIGOLD	QE SECURITIES LLP	BUY	562	311
SSRETAIL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	1242	727
SSRETAIL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	1242	726
SSRETAIL	IRAGE BROKING SERVICES LLP	SELL	632	731
SSRETAIL	IRAGE BROKING SERVICES LLP	BUY	669	733
SSRETAIL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	1252	730
SSRETAIL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	1252	728
SSRETAIL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	665	726
SSRETAIL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	675	725
SSRETAIL	MARWADI CHANDARANA INTERMEDIARIES BROKERS PR	SELL	418	721
SSRETAIL	MARWADI CHANDARANA INTERMEDIARIES BROKERS PR	BUY	443	716
SSRETAIL	MATHISYS QUANTCAP LLP	SELL	463	727
SSRETAIL	MATHISYS QUANTCAP LLP	BUY	464	726
SSRETAIL	MICROCURVES TRADING PRIVATE LIMITED	SELL	434	722
SSRETAIL	MICROCURVES TRADING PRIVATE LIMITED	BUY	434	722
SSRETAIL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	743	726
SSRETAIL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	743	726
SSRETAIL	PLUTUS WEALTH MANAGEMENT LLP	SELL	2012	727
SSRETAIL	PLUTUS WEALTH MANAGEMENT LLP	BUY	2012	727
SSRETAIL	QE SECURITIES LLP	SELL	553	726
SSRETAIL	QE SECURITIES LLP	BUY	574	727
STYLEBAAZA	BHAGWAN PRASAD	SELL	1451	392
STYLEBAAZA	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	SELL	400	395
STYLEBAAZA	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	BUY	400	395
STYLEBAAZA	SACHCHIYAY STOCK BROKING PRIVATE LIMITED	BUY	400	394
TECHERA	NIMESH RAMESHCHANDRA DESAI	SELL	270	153
TECHERA	RBA FINANCE AND INVESTMENT COMPANY	BUY	253	152
VISAMAN	MAYURI SHRIPAL VORA	SELL	367	29
VISAMAN	SANGEETA SHETALBHAI SHAH	BUY	255	29

Block Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
ELECTCAST	ASHA KEJRIWAL	BUY	5,594	71.30
ELECTCAST	BELGRAVE INVESTMENT FUND	SELL	18,762	71.28
ELECTCAST	MAYANK KEJRIWAL	BUY	8,343	71.20
ELECTCAST	WILCOX MERCHANTS PRIVATE LIMITED	BUY	4,825	71.40

Global Macro Events

Event	Previous	Forecast
USA		
Redbook YoY SEP/26	7.6%	
S&P/Case-Shiller Home Price YoY JUL	2.10%	2.00%
House Price Index JUL	442.5	442.9
House Price Index MoM JUL	0.00%	0.10%
House Price Index YoY JUL	2.30%	2.20%
S&P/Case-Shiller Home Price MoM JUL	0.40%	0.20%
NY Fed Bill Purchases 1 to 4 months		
JOLTs Job Openings AUG	7.271M	7.24M
CB Consumer Confidence SEP	89.4	89.0
JOLTs Job Quits AUG	3.056M	3.0M
Dallas Fed Services Index SEP	4.2	1.0
Dallas Fed Services Revenues Index SEP	6.6	2.0
52-Week Bill Auction	4.0%	
6-Week Bill Auction	3.9%	
Fed Goolsbee Speech		
Fed Musalem Speech		
Fed Williams Speech		
Great Britain		
BRC Shop Price Inflation SEP	1.50%	1.70%
BoE Consumer Credit AUG	£2.006B	£1.9B
Mortgage Approvals AUG	56.05K	57.0K
Mortgage Lending AUG	£4.29B	£4.5B
M4 Money Supply MoM AUG	-0.30%	-0.10%
Net Lending to Individuals MoM AUG	£6.3B	£6.4B
Treasury Gilt 2036 Auction	5.16%	
Japan		
40-Year JGB Auction	3.87%	
Coincident Index Final JUL	118.9	120.6
Leading Economic Index Final JUL	116.2	117.9
China		
Current Account Final Q2	$184.3B	$195.1B
Germany		
Bundesbank President Nagel Speech		
India		

ventura **Daily Updates**

Nifty & Bank Spot – Pivot Levels 29/09/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	22780.25	22668	22556	22350	22986	23192	23304
Bank Nifty	54471.65	54142	53813	53189	55095	55719	56048

Fredun Pharmaceuticals Ltd – Technical Stock Call – 29/09/2026

Technical Stock Call	Action	CMP	Target	Support	SL
FREDUN	BUY	1387	1770	(1345-1312)-1288-(1265-1232)	1195

Sector: Healthcare – Pharmaceuticals (INE194R01017)

About: **Fredun Pharmaceuticals Ltd.** is a diversified pharmaceutical and healthcare company engaged in manufacturing generic medicines, nutraceuticals, cosmeceuticals and animal healthcare products. Established in 1987 and headquartered in Mumbai, the company e xports to 50+ countries with a portfolio of over 1,200 registered pharmaceutical products.

View – Medium Term Bullish

The stock commenced its downtrend from 1525.9 (SEP 26).

Stock started trading below the averages & forming lower tops gradually reached a low of 1195.2 (SEP 26).

In the month of SEP 26, Buying emerged at lower levels & the stock commenced its up move rallied upwards marking a high of 14 10, but faced resistance in that area & entered into a consolidation zone trading around the short term averages.

Recently, after forming higher bottoms, the stock has given a **Symmetrical Triangle Breakout** on the daily chart supported by volume reaching to a high of 1399 (SEP 26), which is higher than the previous day's high.

Willaims %R & Advance/Decline indicators suggest Positive crossover.

Target of **1770** is expected with lower support levels at **(1345-1312)-1288-(1265-1232)** in case of intermediate fall.

A stop loss at **1195** is to be followed for the trade.

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

Stock specific news

Tata Sons Restructuring Proposed
Tata Trusts proposed merging Tata Electronics Systems and Tata Consulting Engineers into Tata Sons to increase operating revenue and potentially move Tata Sons outside RBI's upper-layer NBFC framework. The proposed entity would have operating revenue of about ₹1.05 lakh crore, while the proposal still requires board and RBI approval. Reuters

SEBI Clears Adani Settlement
SEBI allowed Gautam Adani and four Adani Group companies to settle alleged minimum-public-shareholding violations for ₹1.48 crore, without admission or denial of the findings. The regulator also said it found insufficient evidence that Vinod Adani controlled two offshore FPIs, reducing a key regulatory overhang for the group. Reuters

SP Group Seeks Debt Refinance
Shapoorji Pallonji Group is seeking an extension of a ₹3,500 crore repayment deadline to 31 October and exploring dollar-denominated debt to refinance liabilities. The group has more than ₹50,000 crore of high-interest debt, making Tata Sons-related asset value and refinancing access important credit-market variables. Reuters

FEMA Rules Ease Exporters
New FEMA trade regulations effective 1 October extend the realisation period for goods invoiced or settled in rupees to 12 months from nine months. Software exporters will use EDF instead of SOFTEX, while merchanting-trade restrictions are also being eased, improving operational flexibility for exporters. Business Standard

H1B Scrutiny Intensifies
US authorities are increasing scrutiny of H-1B sponsors that have laid off American workers in similar roles, alongside a $100,000 fee for certain H-1B workers and additional checks. Indian nationals accounted for around 71% of approved H-1B petitions in FY24, making the changes particularly relevant for Indian IT-services companies. Moneycontrol

H1B Program Faces Wider Probe
The US Department of Labor is expanding investigations into alleged H-1B fraud, worker exploitation and misuse of foreign-labour programmes. The development raises uncertainty around visa-dependent offshore-to-onsite staffing models used by Indian technology-services companies. Times of India

Appliance Prices Rise Again
AC prices are expected to rise 5–8% from October 1, while TVs, refrigerators and washing machines could see 3–4% increases. Higher copper, aluminium, steel, resin, freight and energy costs are driving the third broad price revision of 2026, creating both margin and demand implications for consumer durables. Business Standard

Consumer Electronics Costs Rise
Manufacturers are facing simultaneous increases in imported component, logistics and commodity costs ahead of Diwali. The combination of higher input costs and a weaker rupee could force further price increases or compress margins where manufacturers absorb part of the cost. Economic Times

Power Shortage Prompts Action
The Ministry of Power directed 112 captive coal-based generating stations of 50 MW and above to operate at maximum available capacity from October through December. Plants must maintain coal stocks and sell surplus electricity through power exchanges, supporting thermal generation and exchange volumes. Indian Infrastructure

US Exempts Indian Specialty Drugs
The US has exempted India and 19 other countries from a 100% tariff on certain specialty drugs and ingredients. The exemption reduces an immediate trade-policy risk for affected Indian pharmaceutical exporters and preserves access to the US market for the covered products. Economic Times

Non-Solar Power Gap Widens
India's non-solar-hour energy shortage reached 7,717 MW on 9 September, while daytime demand above 267 GW was met. The gap is increasing the importance of thermal generation, storage and grid balancing as renewable penetration rises. Mercom India

MSEDCL Floats 4GWh BESS Tender
Maharashtra's distribution utility invited bids for 1,000 MW/4,000 MWh of battery energy storage capacity for five years, with a further 500 MW/2,000 MWh green-shoe option. The tender adds a sizeable near-term opportunity for battery-storage developers and integrators. Renewable Watch

NTPC EDF Form Storage JV
NTPC and EDF Power Solutions India entered a 50:50 joint venture to develop pumped-storage, hydropower and other renewable projects, alongside flexibility and transmission assets. The partnership expands NTPC's renewable-storage pipeline and strengthens its presence in firm power solutions. Renewable Watch

NTPC Green Adds Solar Capacity
NTPC Green Energy commissioned 81.34 MW at its Kalasar solar project. The addition increases operating renewable capacity and supports the company's expansion in utility-scale clean-energy generation. Power Peak Digest

Power Grid Wins Transmission Project
Power Grid Corporation won the Lakadia-C transmission project through the tariff-based competitive bidding route. The award adds to the company's regulated transmission pipeline at a time when grid investment is increasing to accommodate renewable capacity. Power Peak Digest

Power Transformer Exports Expand
Shirdi Sai Electricals shipped its first EHV power transformer to the US, marking an entry into the American high-voltage equipment market. The development highlights increasing export opportunities for Indian power-equipment manufacturers amid global grid investment. Power Peak Digest

Tata Power Plant Extension
Tata Power's Mundra Thermal Power Plant received a further extension of government directions for its imported-coal-based operations. The extension keeps the plant available for power supply amid elevated non-solar-hour demand and tighter domestic generation conditions. Power Peak Digest

Chatra Transmission Lines Cleared
Two transmission lines in Chatra received environmental clearance despite earlier forest-related concerns. The approvals remove a project-level execution hurdle and support additional transmission infrastructure in the region. Power Peak Digest

Green Fuel Facility Takes Shape
India is setting up its first port-based e-methanol production facility at Kandla, involving an investment of around ₹2,300 crore and planned production of 150 tonnes per day. The project targets marine-fuel decarbonisation and could create demand for green-fuel infrastructure and port-linked energy assets. Economic Times Energy

Deendayal Port Crosses 90 MMT
Deendayal Port crossed 90 million tonnes of cargo, recording around 27% YoY growth. Strong throughput highlights continued activity across India's port and logistics infrastructure despite global trade-route uncertainty. India Shipping News

India Water Storage Hits Decade Low

Water storage in 178 key reservoirs fell to 70% of capacity, versus a 10-year average of 76.62% and 79% a year earlier. Southern reservoirs were particularly weak at around 50% capacity, raising concerns for hydro generation, irrigation and rural demand. Indian Express

Southern Reservoir Levels Plunge

Reservoir storage across Andhra Pradesh, Telangana, Karnataka, Kerala and Tamil Nadu stood at only 50% of capacity, compared with 87.25% a year earlier. Lower water availability could constrain hydro generation and affect agricultural conditions entering the post-monsoon period. Indian Express

Ethanol Glut Becomes Concern

India is facing an ethanol surplus, with nearly 7 billion litres reportedly without assured market placement. The excess supply is increasing pressure on producers to identify new buyers and could affect ethanol realisations and blending economics. Economic Times Energy

India GCC FTA Talks Advance

India and the Gulf Cooperation Council reviewed trade cooperation and welcomed the launch of FTA negotiations. Greater Gulf market access could benefit Indian exporters across engineering, chemicals, food products and consumer categories if tariff barriers are reduced. India Shipping News

India Mexico Trade Pact Nears

India and Mexico are expected to discuss terms of reference for a preferential trade agreement in early October. The initiative could create additional export opportunities in sectors seeking alternatives to US and other developed-market demand. Moneycontrol Economy

Electronics Localisation Accelerates

India is moving from smartphone assembly towards domestic production of components, sub-components and electronic materials. The shift is supported by growing manufacturing investment and could increase the addressable market for domestic EMS and component suppliers. NDTV Profit

Speciality Steel PLI Reporting Opens

The government opened August 2026 monthly KPI reporting under the PLI Scheme 1.2 for speciality steel, while quarterly progress reporting for Q1 FY27 is also underway. The development indicates continued execution of India's domestic speciality-steel manufacturing incentive programme. MECON PLI Portal

Blue Bond Issue Withdrawn

Sagarmala Finance Corporation withdrew its proposed ₹600 crore, 10-year blue bond after receiving ₹525 crore of bids at coupons ranging from 7.69% to 8.44%, above its targeted sub-8% pricing. The episode highlights rising borrowing costs in India's long-duration debt market. Business Standard

Ports Push Green Shipping

Deendayal Port is developing a port-based e-methanol facility while India's maritime sector increases investment in low-carbon fuels. The move supports the government's broader push to develop green shipping infrastructure and could create new opportunities across ports, engineering and renewable-energy suppliers. India Shipping News

Luxury Investment Gets Boost

Swiss luxury watchmaker Baume & Mercier said India's trade framework with EFTA is improving its long-term investment confidence. Lower trade barriers can support premium consumer imports and broader expansion of international luxury brands in India. Economic Times

Daily Updates

Macro / Non-Stock News

Nifty Falls Below 22,800
Nifty 50 fell 360.25 points (-1.56%) to 22,780.25, while Sensex declined 1,124 points (-1.52%) to 72,771.72, both at their lowest closing levels since March. The NSE market cap fell below $5 trillion, with broad-based risk-off selling driven by crude, yields and geopolitical uncertainty. (Business Standard) Business Standard market report

All Sectors Close Lower
Selling was broad-based, with all NSE sectoral indices ending in the red. PSU Banks were the biggest drag, falling 3.24%, followed by Realty and Oil & Gas, while Nifty Bank declined 1.99%. BSE witnessed 1,271 advances versus 3,218 declines. (Business Standard) Moneycontrol market close

FII Selling Hits September High
FIIs sold ₹5,353 crore on 28 September, their largest single-day September outflow, while DIIs bought ₹5,189 crore. FIIs have now been net sellers in 14 of 19 sessions, taking September outflows to roughly ₹23,885 crore, keeping foreign positioning a major market overhang. (Moneycontrol) Moneycontrol FII-DII update

Expiry Raises Volatility Risk
September F&O contracts expire on 29 September. Nifty September futures closed at 22,918.90, a 138.65-point premium to the cash index, while India VIX jumped 12.54% to 13.69. The combination of expiry positioning and elevated volatility increases the potential for sharp intraday moves. (Business Standard) Business Standard F&O data

22,700 Becomes Key Support
Nifty's immediate support is around 22,700, with a decisive break potentially exposing 22,500. On the options side, maximum Put OI is concentrated at 22,800, followed by 22,500, while Call OI is concentrated at 23,000–23,200. The near-term derivatives range is therefore skewed towards downside risk. (Moneycontrol) Moneycontrol September 29 trade setup

Crude Surges Above $108
Brent crude rose above $108/bbl, with the latest spike following renewed uncertainty over US-Iran negotiations and the reopening of the Strait of Hormuz. Higher oil directly worsens India's import bill and inflation risks while pressuring the INR and oil-consuming sectors. (Moneycontrol) Economic Times oil update

Rupee Tests 96 Level
The rupee weakened 16 paise to ₹95.98/$ on 28 September as crude prices and global yields rose. State-run banks reportedly intervened near the ₹96 level, limiting the decline, but persistent FII selling and elevated oil prices continue to create downside pressure on the currency. (The Economic Times) Reuters rupee update via Economic Times

Bond Yields Hit Highs
India's 10-year government bond yield rose to around 7.18%, a two-year high, while the US 10-year Treasury yield moved above 5.2%. Higher domestic and global yields are particularly negative for rate-sensitive banks, NBFCs and high-duration equity valuations. (Business Standard) Business Standard bond-market report

RBI Completes Debt Drain
RBI has completed ₹1 trillion of net government-bond sales during FY27, its largest annual net sale in a decade. The liquidity-draining operations come as the central bank attempts to manage the large surplus created by FCNR(B) inflows and contain inflationary risks from higher oil prices. (Reuters) Reuters on RBI bond sales

IIP Growth Accelerates To 8%
India's industrial production grew 8% YoY in August, accelerating from 7.4% in July, according to fresh data reported on 28 September. Manufacturing growth remained strong, marking the third consecutive month of 8%-plus expansion. The data provides a positive domestic-growth counterweight to the external macro pressures. (The Economic Times) Economic Times IIP data

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