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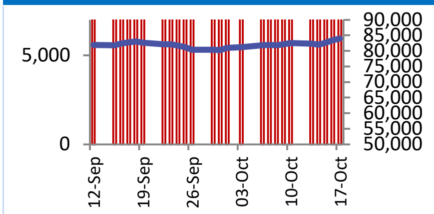
**23rd October, 2025**

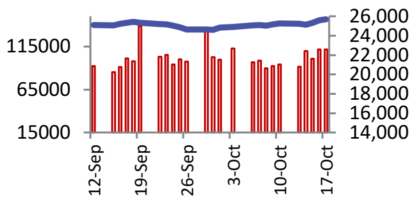
# Daily Report

## BSE




| | |
|---|---|
| Open | 84485 |
| High | 84665 |
| Low | 84286 |
| Close | 84426 |
| Change | 63 |
| Volume (Lacs) | 2538 |
| Turnover (Rs.inCr) | 4182 |

## NSE




| | |
|---|---|
| Open | 25901 |
| High | 25934 |
| Low | 25826 |
| Close | 25869 |
| Change | 25 |
| Volume(Lacs) | 11536 |
| Turnover(Rs.in Cr) | 19714 |

| World Markets | Current | Previous | Pt. Chg | Var(%) |
|---|---|---|---|---|
| Dow | 46590 | 46925 | (334) | -0.71% |
| Dow Futures | 46766 | 46782 | (16) | -0.03% |
| Nasdaq | 22740 | 22954 | (213) | -0.93% |
| FTSE | 9515 | 9427 | 88 | 0.93% |
| Nikkei | 48665 | 49308 | (643) | -1.30% |
| Hang Seng | 25730 | 25782 | (51) | -0.20% |
| Gift Nifty | 26248 | 25877 | 371 | 1.43% |
| Straits Singapore | 4396 | 4394 | 2 | 0.05% |
| South Korea | 3898 | 3884 | 15 | 0.37% |
| Taiwan | 27501 | 27649 | (148) | -0.53% |
| Shanghai | 3887 | 3914 | (26) | -0.67% |

| Commodity Prices | Current | Previous | Pt. Chg | Var(%) |
|---|---|---|---|---|
| Copper ($/MT) | 10663 | 10624 | 40 | 0.4% |
| Alumin ($/MT) | 2807 | 2781 | 26 | 0.9% |
| Zinc ($/MT) | 3029 | 2988 | 41 | 1.4% |
| Brent Crude ($/bbl) | 64 | 63 | 1 | 2.4% |
| Gold ($/Ounce) | 4083 | 4098 | (16) | -0.4% |
| Silver ($/Ounce) | 48 | 48 | (0) | -0.1% |
| Light Crude ($/bbl) | 60 | 59 | 1 | 2.5% |
| N G ($/mmbtu) | 3 | 3 | (0) | 0.0% |
| Sugar ($/MT) | 435 | 433 | 1 | 0.3% |
| Rubber (Rs./kg) | 187 | 187 | 1 | 0.3% |
| Baltic Dry Index | 2092 | 2094 | (2) | -0.1% |

| Currency Exchange Rate | Current | Previous | Var(%) |
|---|---|---|---|
| **Rs./$ rate** | 87.93 | 87.97 | -0.05% |
| **Rs./ Euro** | 102.55 | 102.96 | -0.40% |
| **Rs./Chinese Yuan** | 12.34 | 12.35 | -0.06% |
| **Yen /$ rate** | 152.46 | 151.98 | 0.32% |
| **$ US/Euro** | 1.16 | 1.16 | -0.12% |

| Dollar Index | Current | Previous | Var(%) |
|---|---|---|---|
| Dollar Index | 99.05 | 98.90 | 0.16% |

| Support/ Resistance Levels for Today | | |
|---|---|---|
| | Nifty | Bank Nifty Fut |
| Support 1 | 25770 | 57720 |
| Support 2 | 25700 | 57560 |
| Resistance | 26100 | 58400 |

| Securities in Ban For Trade |
|---|
| SAMMAANCAP |

## Market Review

**US:** Wall Street closed lower on Wednesday as a wave of mixed earnings, including Netflix's disappointing results, dampened risk sentiment as investors assessed reports that the Trump administration is considering curbs on exports to China made with U.S. software.

**Asia:** Asian stocks opened lower following a volatile session on Wall Street that saw broad losses across equities and haven assets.

**India:** Indian benchmark indices ended higher on the first day of the new Samvat with Nifty finishing above 25,850 on October 21. **Market expected to open on a gap up note and likely to witness positive move during the day.**

**Global economy:**

**UK house prices** rose 3.0% year-on-year in Aug, showing a slight slowdown from the upwardly revised 3.2% increase recorded in July. In the rental market, private-sector rents increased by 5.5% yoy in Sep, down from 5.7% in Aug. This represents the smallest annual increase in rental prices since Nov 2022.

**Mexico's economy grew 0.6%** in August compared to the previous month. Despite the month-over-month growth, the Mexican economy contracted 0.9 % when compared to August 2024.

**Energy Information Administration** (EIA) released its weekly report on Crude Oil Inventories, revealing an unexpected decrease. The actual number of barrels of commercial crude oil held by US firms fell by 0.961 mn, a figure that significantly diverged from the forecasted increase of 2.2 mn.

**Commodities:** Oil prices rose by more than $1 per barrel on Thursday, extending gains from the previous session, after the United States imposed sanctions on Russian oil companies Rosneft and Lukoil over the Ukraine war.

Gold declined for a third day, edging back in the direction of $4,000 an ounce on concerns a prolonged rally has become overheated.

**Currency:** The dollar drifted higher against its major peers on Thursday as traders waited on the delayed release of U.S. consumer inflation data on Friday, while digesting tariff threats between Washington and Beijing.

## 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 | 1856 | 361 | 1557 | 304 | 57 | 220479 | 42939 | 213362 | 41300 | 7117 | 1639 |
| Index Option | 779536 | 150591 | 801042 | 154667 | (4076) | 1777103 | 347005 | 2371111 | 459246 | (594008) | (112241) |
| Stock Future | 26294 | 1902 | 19099 | 1475 | 427 | 5753877 | 408615 | 5669736 | 400725 | 84141 | 7890 |
| Stock Option | 16763 | 1303 | 18451 | 1426 | (123) | 473739 | 34250 | 454015 | 32482 | 19724 | 1768 |
| **Total** | **824449** | **154157** | **840149** | **157872** | **(3715)** | **8225198** | **832809** | **8708224** | **933753** | **(483026)** | **(100944)** |

| FII All Activity-BBG (Rs Cr) | Buy | Sell | Net |
|---|---|---|---|
| 13-Oct-25 | 12630 | 9074 | 3555 |
| 14-Oct-25 | 11909 | 12486 | (577) |
| 15-Oct-25 | 15190 | 14494 | 696 |
| 16-Oct-25 | 15953 | 13801 | 2152 |
| 17-Oct-25 | 15282 | 14400 | 882 |
| **Month to date- Oct** | **164530** | **153142** | **11388** |
| **FII (Prov.) (Rs Cr)** | **Buy** | **Sell** | **Net** |
| 14-Oct-25 | 10848 | 12356 | (1509) |
| 15-Oct-25 | 14014 | 13945 | 69 |
| 16-Oct-25 | 14739 | 13742 | 997 |
| 17-Oct-25 | 14505 | 14196 | 309 |
| 20-Oct-25 | 11786 | 10996 | 790 |
| **Month to date-Oct** | **157801** | **157500** | **300** |
| **DII (Prov.) (Rs. Cr)** | **Buy** | **Sell** | **Net** |
| 14-Oct-25 | 16385 | 12723 | 3661 |
| 15-Oct-25 | 16215 | 11565 | 4650 |
| 16-Oct-25 | 19841 | 15765 | 4076 |
| 17-Oct-25 | 16860 | 15334 | 1527 |
| 20-Oct-25 | 15690 | 13205 | 2485 |
| **Month to date-Oct** | **198813** | **168890** | **29923** |
| **FII Debt - BBG (Rs. Cr)** | **Buy** | **Sell** | **Net** |
| 13-Oct-25 | 1520 | 1377 | 143 |
| 14-Oct-25 | 3096 | 2207 | 889 |
| 15-Oct-25 | 5029 | 1446 | 3583 |
| 16-Oct-25 | 4337 | 2102 | 2236 |
| 17-Oct-25 | 3120 | 1786 | 1334 |
| **Month to date- Oct** | **39653** | **27654** | **11999** |

| Market Breadth | BSE | | NSE | |
|---|---|---|---|---|
| | No. | % | No. | % |
| Advance | 3025 | 72% | 2289 | 75% |
| Decline | 980 | 23% | 647 | 21% |
| Unchanged | 182 | 4% | 103 | 3% |

| Market Turnover | 21-Oct | 20-Oct | Var (%) |
|---|---|---|---|
| BSE Cash | 4182 | 9256 | -55% |
| NSE Cash | 19714 | 100097 | -80% |
| NSE Futures | 23006 | 145740 | -84% |
| NSE Options | 2706538 | 64850670 | -96% |
| Total (Rs.Cr) | 2753439 | 65105763 | -96% |

| Volatility Index | 21-Oct | 20-Oct |
|---|---|---|
| Volatility Index | 11.30 | 11.36 |

| Index PE - TTM | 21-Oct | Yr. High | Yr. Low |
|---|---|---|---|
| Sensex | 23.2 | 24.1 | 20.3 |
| Nifty | 22.7 | 23.4 | 19.6 |

## Corporate News

**Gulshan Polyols** has been awarded ethanol supply contracts worth ₹11.85 bn under the Ethanol Blended Petrol Programme. The contracts involve supplying ethanol to Oil Marketing Companies (OMCs), potentially boosting the company's revenue and strengthening its position in the renewable energy sector. (NDTV)

**Filatex India** is sustainable textile manufacturing and circular economy initiatives signed a Memorandum of Understanding (MoU) with Revti Business Pvt. Ltd., and Wastewear Inc. to establish a multi-faceted collaboration . (NDTV)

**Expleo Solutions Ltd** is closing its Competence Centre in Coimbatore and merging it with the MEPZ branch office in Chennai. The Coimbatore centre contributed INR 5.43 mn (0.05%) to FY 2024-25 revenue, with a net worth of INR 29.11 mn.(CNBC)

## Economy

**India has strongly opposed a China-led proposal at the WTO for an investment facilitation agreement**, citing systemic and legal concerns. New Delhi argued that supporters attempted to pressure members rather than engage meaningfully. (ET)

**Reserve Bank of India's gold reserves** have officially crossed 880 metric tonnes during the early months of the 2025-26 financial year. This increase, with an addition of 0. (ET)

**India is actively pursuing a trade deal with the Eurasian Economic Union,** aiming to boost its exports to Russia. Bilateral trade has seen a significant rise, with India's shipments diversifying beyond traditional sectors like machinery and pharmaceuticals to include aluminum and apparel. (ET)

**India is strengthening its trade with Russia, diversifying beyond energy to sectors like agriculture and pharmaceuticals, despite US pressure.** This strategic move includes a significant defense pact for S-400 missile procurement.(ET)

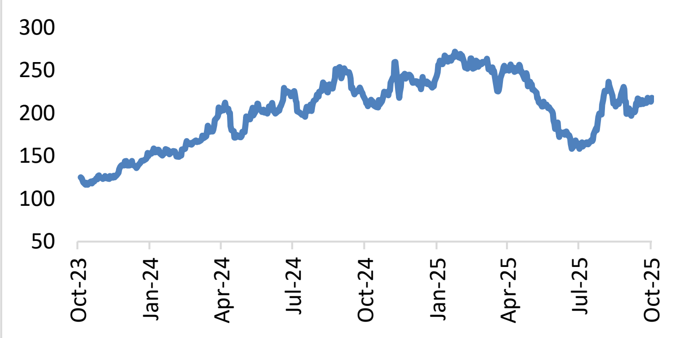
## International

**Brian Kemp, the governor of the U.S. state of Georgia, plans to meet with South Korean business leaders**, including Hyundai Motor and LG Energy announced the $4.3 bn venture near Savannah, Georgia, to produce EV battery cells, with each company holding a 50% stake**.** (Invst)

**U.S.-based gas pipeline operator Williams will invest $1.9 bn in Woodside Energy's $17.5 bn** liquefied natural gas production and export terminal under construction in Louisiana.Under the agreement, Williams will own a 10% stake in the project's holding company and 80% of the Driftwood pipeline that will supply natural gas to the Louisiana LNG project. (Invst)

| Top 5 Nifty Gainers | 21-Oct | 20-Oct | Var(%) |
|---|---|---|---|
| CIPLA | 1664 | 1639 | 1.5% |
| BAJAJFINSV | 2169 | 2140 | 1.4% |
| AXISBANK | 1237 | 1226 | 0.9% |
| INFY | 1472 | 1461 | 0.8% |
| JSWSTEEL | 1153 | 1145 | 0.6% |
| **Top 5 Nifty Losers** | **21-Oct** | **20-Oct** | **Var(%)** |
| KOTAKBANK | 2197 | 2214 | -0.8% |
| HCLTECH | 1486 | 1495 | -0.6% |
| ICICIBANK | 1382 | 1390 | -0.6% |
| MAXHEALTH | 1204 | 1210 | -0.5% |
| ASIANPAINT | 2505 | 2516 | -0.5% |

International Robusta Coffee Price ($/lb) (Source: BBG)




| BSE Index Watch | Last | 1 day | 1 wk | 1 mth | 1 yr |
|---|---|---|---|---|---|
| SENSEX | 84426 | 0.1% | 2.9% | 2.8% | 5.4% |
| MIDCAP | 46787 | 0.2% | 1.9% | 0.9% | 1.3% |
| SMLCAP | 53843 | 0.9% | 2.3% | -0.4% | -0.3% |
| AUTO | 60717 | 0.2% | 2.1% | -0.5% | 9.3% |
| BANKEX | 65366 | 0.0% | 2.6% | 4.4% | 12.3% |
| Capital Goods | 69450 | 0.4% | 1.4% | -1.4% | 2.3% |
| FMCG | 20789 | 0.2% | 4.1% | 2.0% | -5.0% |
| Health Care | 45431 | 0.4% | 2.3% | 1.9% | 6.4% |
| IT | 34565 | 0.2% | 0.1% | -0.6% | -18.1% |
| METAL | 33893 | 0.4% | 1.1% | 0.9% | 7.2% |
| Oil & Gas | 27638 | 0.0% | 2.2% | 2.9% | -2.5% |
| Power | 6871 | 0.3% | 1.6% | -1.3% | -12.7% |
| Realty | 7283 | 0.0% | 5.5% | 2.7% | -6.6% |

| 10 year G-Sec Yield | Current | Previous | Change |
|---|---|---|---|
| **US** | 3.95% | 3.95% | 0 bps |
| **Japan** | 1.66% | 1.65% | 2 bps |
| **India** | 6.50% | 6.51% | (1) bps |
| **UK** | 4.42% | 4.48% | (6) bps |
| **Libor 3 Mths** | 4.85% | 4.85% | (0) bps |

| Indian Eco Data | Current | Previous | Var(%) |
|---|---|---|---|
| Forex Reserve (US$ in bn) | 602 | 698 | -13.8% |
| 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 |

| Margin Trading Disclosure (Rs. In Cr) | Last | 1 day | 1 wk | 1 mth | 3 mth |
|---|---|---|---|---|---|
| Op. Scripwise Outstanding | 109072 | 0.2% | 1.3% | 13.1% | 21.3% |
| Fresh Exposure | 3814 | -18.1% | 7.5% | -46.5% | -40.4% |
| Exposure liquidated | 4465 | 0.5% | 37.4% | -38.0% | -20.3% |
| Closing Net scripwise outstanding | 108421 | -0.6% | 0.4% | 12.5% | 19.5% |

| 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) | 484 | 486 | (2.5) |

| 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 |

| NSE USD Futures | 21-Oct | 20-Oct | Var (%) |
|---|---|---|---|
| Oct Expiry (Rs./$) | 88.16 | 88.16 | 0.0% |
| Nov Expiry (Rs./$) | 88.05 | 87.93 | 0.1% |
| Total Turnover (Rs. Crore) | 238 | 1203 | -80% |

| Sectors | TTM PE |
|---|---|
| Auto | 33.08 |
| Auto Ancillary | 43.33 |
| Banking | 14.54 |
| Engineering | 44.68 |
| Cement | 68.45 |
| Diamonds & Jewellery | 41.84 |
| Housing Finance | 23.53 |
| Infrastructure & Const | 26.33 |
| Metals-Aluminium | 29.11 |
| Metal – Steel | 18.29 |
| Oil Expl. | 7.88 |
| Pharma | 10.51 |
| Power – Gen. Supp. | 39.15 |
| Information Tech. | 31.36 |
| Sugar | 16.78 |
| Telecom Serv. Prov. | 39.42 |
| Tyres | 34.13 |

| 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 | 17.47 | 23013103 | 17.41 | 24526950 | 0.34% | 1 | 1536.18 | 1472.40 | 4.3% |
| Wipro | 2.72 | 9201297 | 2.69 | 8281876 | 1.12% | 1 | 239.18 | 241.36 | -0.9% |
| Dr.Reddy's | 14.87 | 717025 | 14.73 | 513586 | 0.95% | 1 | 1307.56 | 1288.70 | 1.5% |
| ICICI Bank | 31.78 | 4120652 | 31.24 | 3706093 | 1.73% | 2 | 1397.25 | 1382.00 | 1.1% |
| HDFC Bank | 37.18 | 3023785 | 36.69 | 2758382 | 1.34% | 3 | 1089.78 | 1007.70 | 8.1% |

| GDR's (US$) | | | | |
|---|---|---|---|---|
| | Prices | Prev. Close | Change | Var % |
| L&T | 44.60 | 43.95 | 0.6 | 1.5% |
| RIL | 67.20 | 66.70 | 0.5 | 0.7% |
| SBI | 103.20 | 102.60 | 0.6 | 0.6% |

| US Economy Data | Current | Previous |
|---|---|---|
| Inflation (%)(YoY) | 2.90% | 2.70% |
| 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 | 24 Oct |
| 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 |
| ICICI Lombard General Insurance Company Ltd. | 23/10/25 | Rs.6.50 per share(65%)Interim Dividend |
| KSolves India Ltd. | 23/10/25 | Second Interim Dividend |
| Uniparts India Ltd. | 23/10/25 | Rs.22.50 per share(225%)Special Dividend |
| Accelya Solutions India Ltd. | 24/10/25 | Rs.40.00 per share(400%)Final Dividend |
| HDB Financial Services Ltd. | 24/10/25 | Rs.2.00 per share(20%)Interim Dividend |
| Indian Railway Finance Corporation Ltd. | 24/10/25 | Interim Dividend |
| Kajaria Ceramics Ltd. | 24/10/25 | Interim Dividend |
| LTIMindtree Ltd. | 24/10/25 | Interim Dividend |
| Thyrocare Technologies Ltd. | 24/10/25 | Rs.7.00 per share(70%)Interim Dividend |
| CRISIL Ltd. | 27/10/25 | Third Interim Dividend |
| KSE Ltd. | 28/10/25 | Stock Split from Rs.10/- to Re.1/- |

## Bulk Deal As On 21/10/25

**BSE**

| Security Code | Security Name | Client Name | Deal | Quantity | Price |
|---|---|---|---|---|---|
| 544529 | APPL | JEET PARESH VAGHANI | B | 50000 | 122 |
| 544529 | APPL | SAUMIK KETANKUMAR DOSHI | S | 50000 | 122 |
| 526935 | ARUNIS | INDO THAI SECURITIES LIMITED | S | 785570 | 86.44 |
| 526935 | ARUNIS | MAHENDRABHAI KANTILAL SHAH | B | 300000 | 86.44 |
| 526935 | ARUNIS | MANSI SHARE AND STOCK BROKING PRIVATE LIMITED | S | 600000 | 86.44 |
| 526935 | ARUNIS | NEO APEX VENTURE LLP | S | 620000 | 86.44 |
| 526935 | ARUNIS | SAVITRIBEN MAHENDRAKUMAR SHAH | B | 550000 | 86.44 |
| 540310 | CFL | NITA AGARWAL | S | 36000 | 22.14 |
| 543500 | EVOQ | BHAVANA BHUPENDRA PATEL | B | 176000 | 5.95 |
| 543500 | EVOQ | BHUMISHTH NARENDRABHAI PATEL | S | 536000 | 5.93 |
| 531913 | GOPAIST | EWART PROMOTER HOLDINGS PRIVATE LIMITED | S | 43129 | 6.79 |
| 531913 | GOPAIST | VANRAJ DADBHAI KAHOR | B | 36000 | 6.79 |
| 542724 | MURAE | EKLINGJI TRADELINK PRIVATE LIMITED | S | 23194809 | 0.32 |
| 542724 | MURAE | IFL ENTERPRISES LIMITED | S | 20148656 | 0.32 |
| 542724 | MURAE | NIRAV DINESHBHAI CHAUDHARI | B | 30000000 | 0.32 |
| 530805 | OIVL | NEO APEX VENTURE LLP | B | 886307 | 9.95 |
| 530095 | PRADHIN | ABDUL AZEES | S | 7500000 | 0.3 |
| 531201 | SHILCTECH | ALAY JITENDRA SHAH | S | 117000 | 4350.26 |
| 531201 | SHILCTECH | ALCHEMY EMERGING LEADERS OF TOMORROW | B | 90000 | 4347.43 |
| 544165 | SHIVAM | SHRENI SHARES LTD | S | 150000 | 70.52 |
| 543615 | SRSOLTD | OVATA EQUITY STRATEGIES MASTER FUND | S | 138400 | 191.11 |
| 517201 | SWITCHTE | UDAY R SHAH HUF | B | 18108 | 44.11 |
| 524661 | WELCURE | VAGHANI VIRAJ | S | 11460257 | 0.74 |

**NSE**

| Security Code | Security Name | Client Name | Deal | Quantity | Price |
|---|---|---|---|---|---|
| MEGAFLEX | Mega Flex Plastics Ltd | RAINBOW SECURITIES PRIVATE LIMITED | SELL | 75000 | 44.41 |
| RELIABLE | Reliable Data Service Ltd | OM PRAMILA STOCKS PRIVATE LIMITED | SELL | 55962 | 143.28 |

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