

Market Commentary

Overnight global action was positive : On 30th Sept , U.S. markets were positive with S&P 500 up +27.23 pts (+0.41%), Dow Jones was up by +81.76 pts (+0.18 %) and Nasdaq was up by +68.64 pts (+0.28%). India VIX was down by ~2.64%. GIFT Nifty is trading flat at ~24,764 (+2.50 pts, +0.01%) indicating Indian markets will open flat.

On 30th Sept, advance decline ratio on NSE was 1517:1506 and BSE was 1939 : 2173, which showed weakness in the overall markets.

Index Options Data Analysis:

Sensex max call OI is at 81,000 and max put OI is at 80,000 with PCR of 0.69

Nifty max call OI is at 24,600 and max put OI is at 24,650 with PCR of 0.79

Bank Nifty max call OI is at 54,700 and max put OI is at 54,600 with PCR of 0.92

Securities in Ban for F&O Trade for 1st -Oct-2025:

SAMMAANCAP

Sectors in Focus:

PSU BANK : Nifty PSU Bank index was up by +1.84%, **BANKINDIA (+4.17%), CENTRALBK (+3.50%),** and **PNB (+3.28%)** were supporting the index.

Metal : Metal index was up by +1.16% with **NATIONALLUM (+5.17%), HINDZINC (+3.60%)** and **VEDL (+2.95%)** among the top gainers.

Auto: Nifty Auto index was up by +0.40% with **HEROMOTOCO (+3.26%), SONACOMS (+1.74%),** and **TATMOTORS (+1.49%)** contributing positively to the index.

Media: Nifty Media index was down by -1.23%, top losers were **PFOCUS (-5.00%), NAZARA (-4.70%)** and **PVRINOX (-2.44%).**

Consumer Durable: Nifty Consumer Durable index was down by -0.87% with **VOLTAS (-1.97%), DIXON (-1.92%)** and **AMBER (-1.36%)** among the laggards.

Realty : **SIGNATURE (-2.44%), LODHA (-1.19%)** and **DLF (-1.06%)** dragged the Nifty realty index by -0.82%

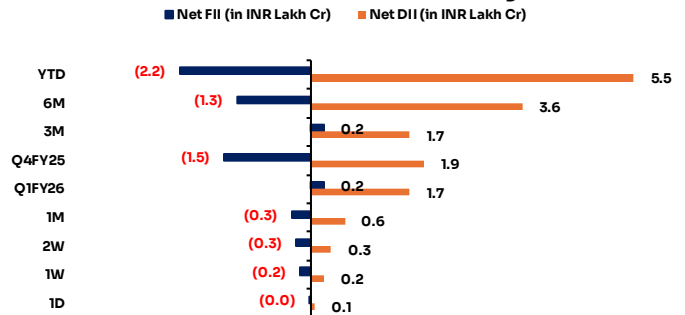
Now listen to the daily market update



Fund Flow Activity (30th Sept 2025)

	Buy	Sell	Net
DII	16,948	11,187	5,762
FII/FPI	18,729	21,057	(2,327)

All figures are in INR Cr



Indian Indices

	CMP	1D (%)	YTD (%)	P/E x
Gift Nifty	24,764	(0.0)	4.1	22.4
BSE Sensex 30	80,268	(0.1)	2.7	21.0
Nifty 50	24,611	(0.1)	4.1	22.3
India VIX	11	(3.2)	(23.9)	NA
Nifty Bank	54,636	0.3	7.4	16.1
Nifty Next 50	67,845	0.0	(0.2)	67.8
Nifty 500	22,734	(0.0)	1.6	21.3
NIFTY Mid 100	56,529	(0.0)	(1.2)	29.1
Nifty Small 250	16,693	0.2	(6.0)	28.1
USD/INR	88.8	0.2	3.8	
Dollar Index	97.5	(0.1)	(10.0)	
WTI Crude (\$/bbl)	62.2	(2.0)	(12.7)	
Gold (\$)	3,841	(0.4)	45.4	
India 10Y	6.57%	0.2	(2.7)	
India 2Y	5.85%	1.0	(12.8)	
India 1Y	5.73%	2.0	(14.1)	
Bank Rate	5.75%	NA	NA	

Global Markets

	CMP	1D (%)	YTD (%)	P/E x
S&P 500	6,688	0.4	13.7	29.0
DJIA	46,398	0.2	9.1	22.4
Nasdaq	24,680	0.3	17.5	40.5
FTSE	9,350	0.5	14.4	14.7
CAC	7,896	0.2	7.0	15.0
DAX	23,881	0.6	20.0	14.0
Nikkei 225	44,933	(0.3)	12.6	24.0
Hang Seng	26,856	0.9	33.9	13.0
Shanghai Co	3,883	0.5	15.8	15.0
KOSPI	3,425	(0.2)	42.7	15.0
S&P/ASX 200	8,849	(0.2)	8.5	18.0

Stocks in the News

- Adani Enterprises Limited (CMP: 2505.95, MCap: 2,89,231 Cr, Sector: Conglomerate, Valuation: 51.76x FY26 P/E)**
 Adani Road Transport Limited, a wholly owned subsidiary, signed a Share Purchase Agreement, signaling a strategic move towards expanding or consolidating interests in the road transport sector, though specific details of the agreement were not fully disclosed.
News Source: [ADANIENT](#)
- Lupin Limited (CMP: 1910.15, MCap: 87,247 Cr, Sector: Pharmaceuticals, Valuation: 13.47x FY26 EV/EBITDA)**
 Lupin received U.S. FDA approval for Rivaroxaban for Oral Suspension, expanding its product portfolio in the cardiovascular treatment segment and potentially boosting its market share in the U.S.
News Source: [LUPIN](#)
- Shree Cement Limited (CMP: 29295.3, MCap: 1,05,699 Cr, Sector: Cement, Valuation: 57.21x FY26 P/E)**
 The company commissioned a clinkerisation unit with a capacity of 3.65 MTPA at its integrated cement plant in Jaitaran, Beawar, Rajasthan, marking a significant capacity addition to enhance production capabilities. Additionally, they received an order from the West Bengal Pollution Control Board, though specific details of the order's impact were not provided.
News Source: [SHREECEM](#)
- Newgen Software Technologies Limited (CMP: 888.95, MCap: 12,594 Cr, Sector: IT - Software, Valuation: 34.44x FY26 P/E)**
 Newgen Software Technologies (UK) Limited secured an agreement worth £2,985,484 for software services in the UK. Additionally, Newgen Software Inc. entered agreements valued at USD 1,637,400 and USD 5,636,000 for content and loan management systems in the Caribbean and elsewhere, and accepted a Letter of Award worth KWD 1,736,052 in Dubai for a business process management platform.
News Source: [NEWGEN](#)
- Swan Defence and Heavy Industries Limited**
 SDHI signed a strategic MoU with Samsung Heavy Industries to advance shipbuilding and maritime projects, aiming to leverage combined expertise for growth in these sectors.
News Source: [SWANRNL](#)

Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
Long		
UPL	34.7	0.5
YESBANK	30.1	0.5
NUVAMA	29.7	0.5
HUDCO	27.2	1.4
IRCTC	24.2	0.1
Short		
LICHSGFIN	32.1	(0.4)
IRFC	27.3	1.48
SOLARINDS	27.1	(0.7)
BHARTIARTL	25.2	(1.3)
MCX	24.5	(1.8)
Long Unwinding		
OIL	(2.6)	(0.4)
Short Unwinding		
SAMMAANCAP	(9.3)	3.6
BLUESTARCO	(2.1)	0.8

Sectoral Indices

	CMP	1D (%)	YTD (%)	P/E(x)
Nifty Auto	26,542	0.4	16.2	21.9
Nifty IT	33,655	(0.1)	(22.3)	26.3
Nifty Fin Ser	26,022	0.1	10.7	17.0
Nifty Pharma	21,454	(0.1)	(8.4)	35.3
Nifty Services	31,851	(0.1)	1.4	35.0
Nifty Cons Dur	37,115	(0.9)	(11.2)	50.3
Nifty PSE	9,801	0.3	2.8	10.3
Nifty FMCG	54,711	(0.4)	(3.7)	37.7
Nifty Pvt Bank	26,462	0.2	6.8	9.9
Nifty PSU Bank	7,527	1.8	15.1	12.3
Nifty India Cons	12,063	(0.4)	6.2	42.6
Nifty Realty	868	(0.8)	(17.6)	37.7
Nifty Infra	9,007	(0.5)	6.4	20.9
Nifty Energy	35,000	(0.2)	(0.5)	11.1
Nifty Healthcare	14,139	(0.0)	(5.4)	33.8
Nifty India Mfg	14,770	0.1	6.9	27.5
Nifty Media	1,543	(1.2)	(15.1)	22.0
Nifty Metal	10,038	1.2	16.1	18.0
Nifty Oil & Gas	11,281	(0.0)	5.0	17.3
Nifty Comm	8,986	0.4	10.7	74.9

6. Time Technoplast Limited (CMP: 210.2, MCap: 9,540 Cr, Sector: Plastics, Valuation: 9.34x FY26 P/E)

The company obtained a BIS License under IS 14885:2022 for manufacturing and selling PE Pipes for Gas Distribution networks, marking a significant step in expanding its product offerings in the gas distribution sector.

News Source: [TIMETECHNO](#)

7. Rategain Travel Technologies Limited (CMP: 644.35, MCap: 7,608 Cr, Sector: IT - Software, Valuation: 32.61x FY26 P/E)

RateGain announced the acquisition of Sojern, enhancing its AI-led capabilities in hospitality tech, aimed at strengthening its position in the travel and hospitality sector through advanced technological integrations.

News Source: [RATEGAIN](#)

8. Hindustan Construction Company Limited (CMP: 27.1, MCap: 4,930 Cr, Sector: Infrastructure, Valuation: 7.14x TTM EV/EBITDA)

HCC entered into a strategic collaboration with KRCL for large-scale transport projects in India and overseas, aiming to leverage combined expertise for infrastructure development.

News Source: [HCC](#)

9. Atlanta Limited

Atlanta Limited entered into an agreement with IRCON International Limited for constructing an Expressway Project valued at ₹2,485 crore plus GST, significantly boosting its infrastructure project portfolio.

News Source: [ATLANTA](#)

10. RITES Limited (CMP: 246.05, MCap: 11,825 Cr, Sector: Infrastructure, Valuation: 14.7x FY26 EV/EBITDA)

RITES signed an MoU with Etihad Rail to further business collaboration, focusing on railway infrastructure and services in the UAE, which could enhance its international presence and project pipeline.

News Source: [RITES](#)

Commodities

	CMP	1D (%)	YTD (%)
Gold (INR/10gm)	1,17,265	0.8	51.9
Silver (INR/Kg)	142,145	0.9	62.8
Brent Crude Oil (\$/bbl)	66.9	0.18	(11.7)
WTI Crude Oil (\$/bbl)	62.3	0.2	(13.1)
Natural Gas (INR/MMBTU)	296.1	2.1	(3.0)
Copper (INR/Kg)	952.5	(0.6)	20.1

Currency

	CMP	1D (%)	YTD (%)
USD/INR	88.8	0.0	3.7
EUR/INR	104.3	(0.0)	17.3
GBP/INR	119.3	0.0	11.1
JPY/INR	0.6	0.1	9.9
EUR/USD	1.2	(0.1)	13.4

Securities Lending & Borrowing Scheme (SLBS)

Stock	Underlying LTP	Futures LTP	Spread (%)
GODREJCP	1168.9	1149.6	1.7
OBEROIRLT	1590.0	1575.9	0.9
DELHIVERY	453.9	450.0	0.9
KFINTECH	1,058.0	1,049.5	0.8
GRASIM	2,769.0	2,749.5	0.7

For more news related item, refer to **News Section**

Nifty & Bank Nifty Spot – Pivot Levels – 01/10/2025

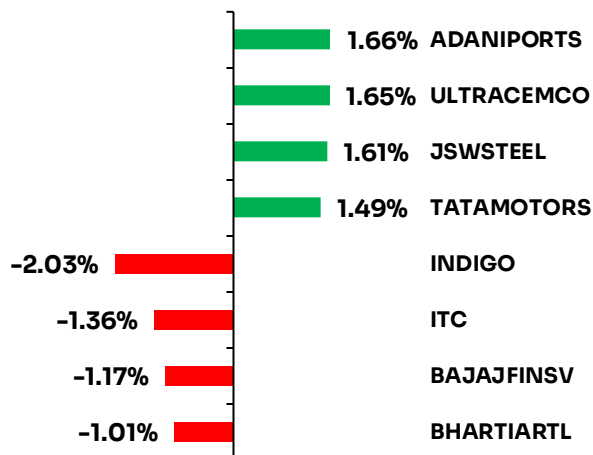
	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	24611	24555	24499	24411	24699	24787	24843
Bank Nifty	54635	54493	54352	54202	54784	54934	55075

Global Macro Events (1st Oct 2025)		
Event	Previous	Forecasted
India		
RBI Interest Rate Decision	0.06	0.06
Cash Reserve Ratio	0.04	0.04
HSBC Manufacturing PMI Final SEP	59.30	58.50
M3 Money Supply YoY SEP/19	9.50%	
United States		
Fed Bostic Speech		
API Crude Oil Stock Change SEP/26	-3.821M	
Fed Logan Speech		
MBA 30-Year Mortgage Rate SEP/26	0.06	
MBA Mortgage Applications SEP/26	0.01	
MBA Mortgage Market Index SEP/26	388.30	
MBA Mortgage Refinance Index SEP/26	1609.80	
MBA Purchase Index SEP/26	174.50	
ADP Employment Change SEP	54K	40.0K
S&P Global Manufacturing PMI Final SEP	53.00	52.00
ISM Manufacturing PMI SEP	48.70	49.00
ISM Manufacturing Employment SEP	43.80	44.00
Construction Spending MoM AUG	0.00	0.00
ISM Manufacturing New Orders SEP	51.40	51.50
ISM Manufacturing Prices SEP	63.70	63.60
EIA Crude Oil Stocks Change SEP/26	-0.607M	
EIA Gasoline Stocks Change SEP/26	-1.08M	
EIA Crude Oil Imports Change SEP/26	1.596M	
EIA Cushing Crude Oil Stocks Change SEP/26	0.177M	
EIA Distillate Fuel Production Change SEP/26	0.029M	
EIA Distillate Stocks Change SEP/26	-1.685M	
EIA Gasoline Production Change SEP/26	0.3M	
EIA Heating Oil Stocks Change SEP/26	-0.189M	
EIA Refinery Crude Runs Change SEP/26	0.052M	
17-Week Bill Auction	3.81%	
Japan		
BoJ Summary of Opinions	1.312M	
Industrial Production MoM Prel AUG	0.80%	
Retail Sales YoY AUG	0.50%	
Industrial Production YoY Prel AUG	0.20%	
Retail Sales MoM AUG	0.01	
2-Year JGB Auction		
Housing Starts YoY AUG	-6.00%	
Construction Orders YoY AUG	-0.03	
Tankan Large Manufacturers Index Q3	13	15
Tankan Large All Industry Capex Q3	0.115	0.05
Tankan Large Manufacturing Outlook Q3	12	16
Tankan Large Non-Manufacturing Index Q3	34.00	40.00

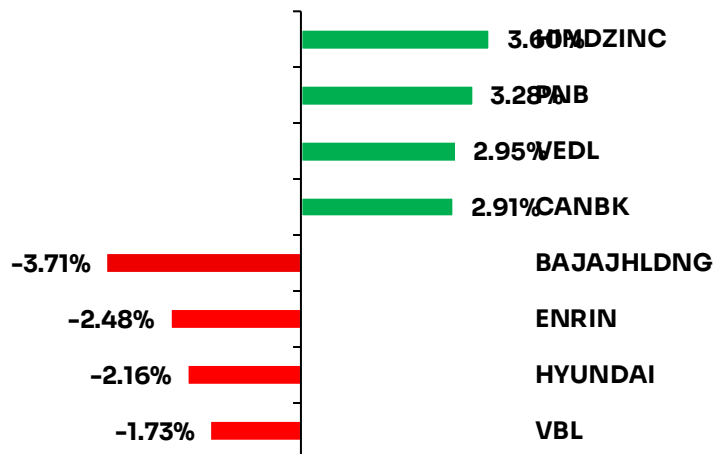
Tankan Non-Manufacturing Outlook Q3	27.00	26.00
Tankan Small Manufacturers Index Q3	1.00	1.00
Event	Previous	Forecasted
China		
NBS Manufacturing PMI SEP	49.90	
NBS Non Manufacturing PMI SEP	50.70	
NBS General PMI SEP	50.80	
RatingDog Manufacturing PMI SEP	50.80	
RatingDog Services PMI SEP	52.60	
RatingDog Composite PMI SEP	52.00	
Current Account Final Q2	\$165.4B	\$135.1B
Great Britain		
Nationwide Housing Prices MoM SEP	0.00	0.01
Nationwide Housing Prices YoY SEP	0.02	0.02
S&P Global Manufacturing PMI Final SEP	47.00	46.20
Index-linked Treasury Gilt 2035 Auction	0.02	
GDP Growth Rate YoY Final Q2	0.01	0.01
BoE Lombardelli Speech		
BoE Ramsden Speech		
BoE L Mann Speech		
BoE Breeden Speech		
Germany		
HCOB Manufacturing PMI Final SEP	49.80	48.50
10-Year Bund Auction	0.03	

Top Gainers and Loser

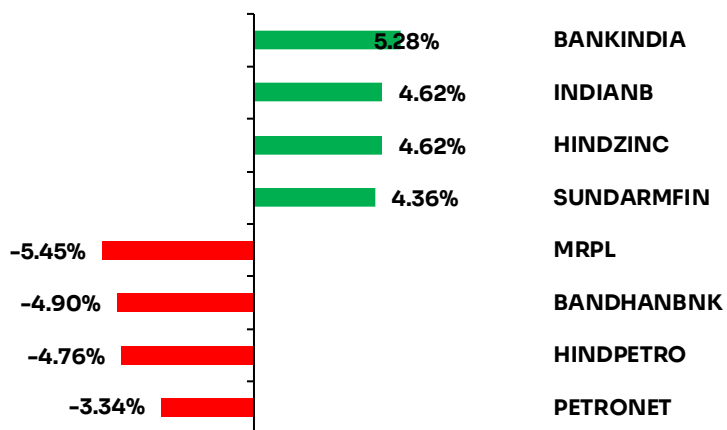
Nifty 50



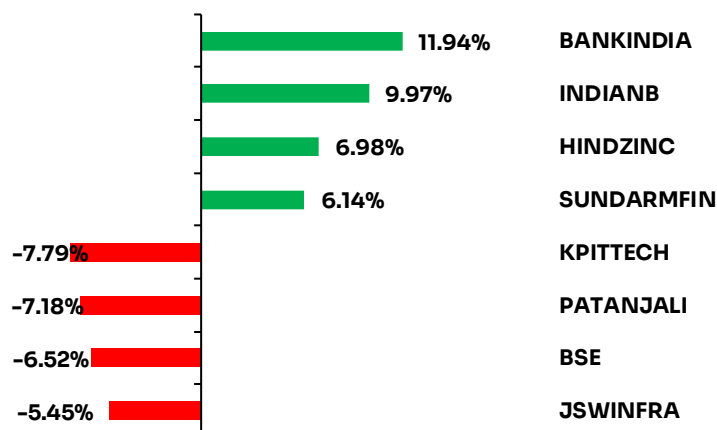
Nifty Next 50



Nifty 200



Nifty 500



Technical Board - Nifty 50									
Stock*	CMP	Trend	5 DMA	20 DMA	50 DMA	100 DMA	200 DMA	RSI	
ETERNAL	325.5	Strong Uptrend	330.45	329.03	316.23	282.78	258.73	51	
HNDL	2514.4	Strong Uptrend	2523.94	2591.2	2559.7	2461.8	2392	41	
JSTL	1992.7	Strong Uptrend	2015.78	1992.8	2007	2070.8	2014.3	47	
SHFL	616.1	Strong Uptrend	616.9	611.81	617.59	642.4	622.15	50	
ADE	2505.9	Uptrend	2585.16	2427.1	2404.9	2469.6	2404.7	56	
BJAUT	8678.5	Uptrend	8817.1	9042.2	8645.7	8554.4	8440.9	41	
TCS	2888.4	Uptrend	2970.08	3074.5	3079	3258.1	3528.6	28	
ADSEZ	1403.5	Neutral	1411.12	1388.7	1373.3	1394.7	1279.1	54	
APHS	7435	Neutral	7581.1	7763.8	7611.6	7355.1	7067.7	34	
APNT	2350	Neutral	2398.7	2493.5	2475.5	2398.8	2353.2	30	
BAF	998.9	Neutral	1008.81	977.65	928.29	925.33	869.52	60	
BHARTI	1878.4	Neutral	1924.84	1915.2	1909.7	1905.7	1792.4	39	
BJFIN	2006.4	Neutral	2043.42	2038.5	1991.6	2003.3	1910.9	46	
CIPLA	1505	Neutral	1512.44	1549.8	1541.7	1516.7	1493.2	40	
DRRD	1223.7	Neutral	1273.88	1287	1266.3	1271	1243.8	35	
GRASIM	2769	Neutral	2778.64	2808.8	2784.4	2750.1	2633	44	
HCLT	1385.1	Neutral	1415.72	1446.7	1470.6	1569.6	1629.9	33	
HDFCLIFE	755.3	Neutral	766.27	771.25	768.74	768.66	708.14	40	
HUVR	1348	Neutral	1372.1	1398.8	1427.5	1431.3	1362.4	23	
LT	1114.7	Neutral	1132.66	1157.8	1205.4	1205.5	1147.8	35	
MSIL	16029	Neutral	16177	15525	14127	13334	12608	71	
NEST	1152.9	Neutral	1167.12	1195.6	1167.3	1183.8	1153.4	40	
ONGC	239.5	Neutral	238.57	235.89	237.36	240.94	242.4	57	
PWGR	280.25	Neutral	285.83	285.84	287.12	291.07	291.65	42	
SUNP	1598	Neutral	1612.34	1607.8	1630.3	1658.2	1704.3	44	
TATACONS	1132.5	Neutral	1128.98	1108.9	1085.7	1097.9	1050.5	60	
UTCCEM	12222	Neutral	12173.4	12479	12461	12112	11706	43	
WPRO	239.37	Neutral	242.322	248.83	249.44	253.49	268.81	38	
AXSB	1131.6	Downtrend	1156.5	1106.8	1087.1	1141.2	1103.2	57	
BHE	403.95	Downtrend	399.78	392.63	387.46	390.52	337.34	58	
COAL	389.95	Downtrend	391.37	391.91	385.38	389.53	386.47	51	
EIM	7005.5	Downtrend	7004	6818.4	6162.8	5826	5487.8	72	
HMCL	761.95	Downtrend	746.05	745.07	713.91	687.33	656.73	67	
ICICIBC	5594.5	Downtrend	5672.1	5691.2	5811.5	5692.9	5177.3	42	
IIB	1441.8	Downtrend	1473.52	1494	1492.9	1542.7	1640.4	38	
INFO	401.55	Downtrend	403.33	409.1	410.08	416.09	421.51	42	
JIOFIN	1142.7	Downtrend	1137.8	1107.2	1071.1	1041.7	1006.6	65	
KMB	3659	Downtrend	3678.74	3619.3	3597.4	3601.6	3505.1	54	
MM	3427	Downtrend	3506.82	3543.8	3374.9	3236.8	3058.8	46	
NTPC	340.45	Downtrend	341.99	334.79	335.47	336.54	335.66	55	
SBILIFE	1790.6	Downtrend	1806.76	1814.3	1826	1812.8	1654.2	43	
SBIN	872.45	Downtrend	865.13	836.31	821.75	812.59	789.99	70	
TATA	168.77	Downtrend	170.942	169.48	163.34	160.6	150.21	53	
TRENT	4677.5	Downtrend	4788	5131.5	5233.9	5441.4	5565.9	25	
TTMT	680.2	Downtrend	678.8	698.76	683.3	692.18	694.79	45	
UTCCEM	12041	Downtrend	12295.2	12518	12470	12108	11704	35	
WPRO	239.64	Downtrend	244.46	249.37	249.86	253.51	269.16	39	
TECHM	1444.3	Downtrend	1506.84	1507.3	1504.5	1559.4	1570	36	
TRENT	4742.5	Downtrend	5004.5	5223	5274.7	5456.7	5599.3	24	
TTMT	664.29999	Downtrend	699.84	700	684	692.2	696.82	37	
UTCCEM	12141	Downtrend	12479.8	12566	12485	12100	11701	38	
HDFCB	951	Strong Downtrend	950.69	960.88	979.35	977.86	928.47	38	
ITC	293.2	Strong Downtrend	302.19	310.06	317.06	307.52	280.84	25	
RELIANCE	1364	Strong Downtrend	1379.12	1385.5	1393.3	1425.2	1341.2	39	
TECHM	1400.3	Strong Downtrend	1437.4	1496.3	1494.8	1557.1	1564.7	30	
TTAN	3367	Strong Downtrend	3392.9	3537.3	3507	3525.8	3402.9	34	

52 W High

Stock	LTP		New 52W/H price	Prev.High	Prev. High Date
MUTHOOTFIN	3080	▼	3117.9	3100.8	24-Sep-25
INDIANB	748	▼	761.05	727.95	29-Sep-25
TATAINVEST	10598	▲	10611.5	9128	29-Sep-25
GOLDBEES	95.92	▼	97.74	97.5	24-Sep-25
NETWEB	3638	■	3750	3745	26-Sep-25

52 W Low

Stock	LTP		New 52W/L price	Prev.Low	Prev. Low Date
TCS	2891	■	2885.1	2891.3	26-Sep-25
CROMPTON	291.4	▼	286	290.35	26-Sep-25
MANYAVAR	695	▼	684.4	687.1	29-Sep-25
SANOFI	4639	▲	4623.5	4695	29-Sep-25
PRAJIND	329.45	▼	329	340	29-Sep-25

Volume Shockers

Stock	LTP	% chg in price	Volume	Avg Volume	% chg in Vol
R M Drip & Spri	76	4	33,36,264	9,800	33944%
Tamil Newsprint	158	7	98,30,510	81,181	12009%
Spectrum Talent	98	-5	8,805	3,520	11105%
Blue Dart	5,703	2	10,67,298	14,949	7039%
Chemfab Alkalix	654	10	2,68,828	4,503	5870%
KCK Industries	43	-3	7,57,500	13,600	5470%
Atal	23	7	54,82,819	1,00,889	5334%
IFGL Refractory	294	18	84,87,734	1,79,466	4629%
Peninsula Land	34	9	45,97,756	2,38,652	4183%
Palash Securiti	118	-2	8,668	3,988	3543%
Prozone Intu	53	7	66,92,763	11,07,781	3468%
Man Industries	364	-11	1,00,91,065	3,67,370	2647%

Bulk Deals

Stock	Client Name	Action	Quantity Traded	Weighted Avg Price
AAATECH	M7 GLOBAL FUND PCC - CELL DEWCAP FUND	BUY	280000	79.6
AAATECH	RUCHI ANJAY AGARWAL	SELL	280000	79.6
ACTIVEINFR	RAAYA SYNERGIES	BUY	748800	186
ACTIVEINFR	VAST INTEGRATED SERVICES LIMITED	SELL	748800	186
AFFORDABLE	ANANTNATH SKYCON PRIVATE LIMITED	BUY	150000	223.08
AFFORDABLE	HARSHARAN SINGH KHERA	SELL	159750	223.09
AGIIL	CHUNGATH KARUNAKARAN PADMA KUMAR	BUY	128000	1250
AGSTRA	NEOMILE GROWTH FUND - SERIES I	SELL	666723	3.93
ANONDITA	COGNIZANT CAPITAL DYNAMIC OPPORTUNITIES FUND	SELL	170000	340.04
ANZEN	SEPL ENERGY PRIVATE LIMITED	SELL	1700000	115
ARSSBL	ASCENT FINECHEM PRIVATE LIMITED	BUY	536000	444.02
ARSSBL	GRAVITON RESEARCH CAPITAL LLP	SELL	500006	443.36
ARSSBL	GRAVITON RESEARCH CAPITAL LLP	BUY	500006	442.99
ARSSBL	IRAGE BROKING SERVICES LLP	BUY	304881	439.95
ARSSBL	IRAGE BROKING SERVICES LLP	SELL	344582	441.95
ARSSBL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	694644	441.49
ARSSBL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	706224	441.1
ARSSBL	LOKESH THAKRAL	SELL	600000	437.3
ARSSBL	LOKESH THAKRAL	BUY	600000	444.47
ARSSBL	RAJESH CHAMANLAL SANGHAVI	BUY	616771	442.38
ARSSBL	RAJESH CHAMANLAL SANGHAVI	SELL	616771	442.14
ARSSBL	SHARE INDIA SECURITIES LIMITED	BUY	318926	439.99
ARSSBL	SHARE INDIA SECURITIES LIMITED	SELL	318926	441.01
ARSSBL	URUDAVAN INVESTMENT AND TRADING PVT. LTD.	SELL	175000	439.45
ARSSBL	URUDAVAN INVESTMENT AND TRADING PVT. LTD.	BUY	350000	439.17
ATALREAL	ACME CAPITAL MARKET LIMITED	BUY	822696	22.43
ATALREAL	ACME CAPITAL MARKET LIMITED	SELL	822696	22.57
ATALREAL	PASHUPATI CAPITA SER PVT LTD	SELL	135716	22.29
ATALREAL	PASHUPATI CAPITA SER PVT LTD	BUY	784582	22.49
AWFIS	VBAP HOLDINGS PRIVATE LIMITED	SELL	996307	570.12
BLUEDART	GRAVITON RESEARCH CAPITAL LLP	SELL	120308	5947.96
BLUEDART	GRAVITON RESEARCH CAPITAL LLP	BUY	120308	5945.05
CBAZAAR	MODY PRAKASH AMRUT	SELL	128000	3.78

Stock	Client Name	Action	Quantity Traded	Weighted Avg Price
CYBERTECH	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	207966	218.48
CYBERTECH	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	207966	218.43
CYBERTECH	JASVANTIBEN VELJI BABRIYA	BUY	156957	217.34
CYBERTECH	JASVANTIBEN VELJI BABRIYA	SELL	156957	218.13
CYBERTECH	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	225613	217.45
CYBERTECH	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	225613	217.06
CYBERTECH	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	307531	217.73
CYBERTECH	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	307531	217.9
CYBERTECH	QE SECURITIES LLP	BUY	167044	218.26
CYBERTECH	QE SECURITIES LLP	SELL	169051	217.59
CYBERTECH	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	198182	217.56
CYBERTECH	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	198182	217
ECOLINE	BHANSALI FINCOM PVT LTD	BUY	200000	140.85
ECOLINE	FINAVENUE GROWTH FUND	BUY	200000	140.85
ECOLINE	INDIA MAX INVESTMENT FUND LIMITED	BUY	150000	140.85
ECOLINE	JAIN SANJAY POPATLAL	BUY	350000	140.93
ECOLINE	LRSD SECURITIES PRIVATE LIMITED	SELL	145000	140.54
ECOLINE	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	BUY	350000	140.85
GATECH	NEO APEX VENTURE LLP	SELL	7038608	0.67
GATECH	NEO APEX VENTURE LLP	BUY	9457675	0.67
IFGLEXPOR	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	371664	289.41
IFGLEXPOR	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	371664	289.67
INTEGRITY	ARC FINANCE LIMITED	BUY	72000	101
INTEGRITY	ARYAMAN CAPITAL MARKETS LIMITED	SELL	72000	101
IRMENERGY	HRTI PRIVATE LIMITED	BUY	204233	364.28
IRMENERGY	HRTI PRIVATE LIMITED	SELL	213753	367.34
JARO	DEVI TRADERS LLP	BUY	124500	747.55
JARO	DEVI TRADERS LLP	SELL	124500	742.44
JARO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	112817	780.31
JARO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	112817	780.42
JARO	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	SELL	420819	749.76
JARO	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	BUY	420819	841.12

Stock	Client Name	Action	Quantity Traded	Weighted Avg Price
KANDARP	PASHUPATI CAPITA SER PVT LTD	SELL	176000	100
MANINDS	GRAVITON RESEARCH CAPITAL LLP	BUY	841836	361.37
MANINDS	GRAVITON RESEARCH CAPITAL LLP	SELL	841836	361.85
MGSL	AANJAY AGELESS AIF FUND	BUY	96000	103.07
MGSL	GANESH DASS GUPTA	BUY	165600	103.9
MGSL	NEXUS EQUITY GROWTH FUND SCH-1	BUY	84000	103.9
MGSL	PACE STOCK BROKING SERVICES PVT LTD	BUY	301200	103.88
MGSL	VIPIN AGGARWAL	BUY	103200	103.81
NGIL	L7 HITECH PRIVATE LIMITED	SELL	98454	34.18
NGIL	L7 HITECH PRIVATE LIMITED	BUY	126409	34.07
NIBE	AEGIS INVESTMENT FUND	SELL	277877	1451
NIBE	VENUS INVESTMENTS VCC - VENUS STELLAR FUND	BUY	277877	1451
NIRMAN	NEO APEX VENTURE LLP	SELL	39000	180.8
NIRMAN	NEO APEX VENTURE LLP	BUY	138300	178.8
ONDOOR	ABHISHEK AGRAWAL	BUY	300	149
ONDOOR	ABHISHEK AGRAWAL	SELL	84300	145
ONDOOR	DARSHAN JAYSUKHLAL MEHTA	BUY	45000	144.9
ONDOOR	DEEPAK MANOHARLAL SONI	BUY	30000	145
ONDOOR	OM PRAMILA STOCKS PRIVATE LIMITED	BUY	49800	145
PANACHE	L7 HITECH PRIVATE LIMITED	SELL	130000	396
PANACHE	PM CONSULTANCY	BUY	130000	396
PROZONER	APAX TRUST	BUY	1767490	54.41
PROZONER	IRAGE BROKING SERVICES LLP	SELL	1088377	55.51
PROZONER	IRAGE BROKING SERVICES LLP	BUY	1214694	55.27
PROZONER	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1362536	55.73
PROZONER	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1362536	55.6
PROZONER	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	2112006	55.86
PROZONER	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	2112006	55.79
PROZONER	QE SECURITIES LLP	BUY	768327	55.58
PROZONER	QE SECURITIES LLP	SELL	785306	55.9
PROZONER	SARITA JAIN	BUY	25000	52
PROZONER	SARITA JAIN	SELL	1134323	55.16

Stock	Client Name	Action	Quantity Traded	Weighted Avg Price
PROZONER	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	883071	55.36
PROZONER	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	883071	55.47
SAMMAANCAP	GRAVITON RESEARCH CAPITAL LLP	BUY	10272655	158.59
SAMMAANCAP	GRAVITON RESEARCH CAPITAL LLP	SELL	10272655	158.65
SAMMAANCAP	HRTI PRIVATE LIMITED	BUY	3863649	158.03
SAMMAANCAP	HRTI PRIVATE LIMITED	SELL	4184574	158.5
SAMMAANCAP	SHARE INDIA SECURITIES LIMITED	BUY	3927863	158.44
SAMMAANCAP	SHARE INDIA SECURITIES LIMITED	SELL	4311449	158.56
SANGINITA	YASH ENTERPRISES	BUY	192000	10.1
SAWALIYA	BAAHUBALI ENTERPRISE	BUY	1200	230
SAWALIYA	BAAHUBALI ENTERPRISE	SELL	56400	230
SIDDHICOTS	JEVIN STOCK BROKER PRIVATE LIMITED	SELL	148800	74.1
SPECTSTM	NEOMILE CORPORATE ADVISORY LIMITED	SELL	392000	97.6
SPECTSTM	NEOMILE GROWTH FUND - SERIES I	BUY	391200	97.6
TATAINVEST	HRTI PRIVATE LIMITED	SELL	304655	9869.7
TATAINVEST	HRTI PRIVATE LIMITED	BUY	306448	9814.63
TATAINVEST	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	340243	9875.58
TATAINVEST	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	340243	9870.81
TECHD	ALGOQUANT FINTECH LIMITED .	SELL	49200	511.35
TECHD	BANDLAMUDI GOPI CHAND	BUY	38400	515.79
TECHD	HARISH KUMAR GUPTA	BUY	88200	508.26
TECHD	NEO APEX VENTURE LLP	BUY	25200	514.21
TECHD	NEO APEX VENTURE LLP	SELL	203400	515.8
TECHERA	JITENDRA RASIKLAL SANGHAVI	SELL	200000	268.8
TECHERA	NEO APEX VENTURE LLP	BUY	170400	268.3
TECHERA	NEO APEX VENTURE LLP	SELL	248800	268.8
TNPL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	387293	167.14
TNPL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	387293	167.01
URAVIDEF	NUPUR ANIL SHAH	BUY	80000	224
URAVIDEF	VINEY CORPORATION LIMITED	SELL	298464	224.16
VASCONEQ	GRAVITON RESEARCH CAPITAL LLP	SELL	1468658	69.07
VASCONEQ	GRAVITON RESEARCH CAPITAL LLP	BUY	1468658	69.03

Stock	Client Name	Action	Quantity Traded	Weighted Avg Price
VASCONEQ	HRTI PRIVATE LIMITED	SELL	1605925	68.93
VASCONEQ	HRTI PRIVATE LIMITED	BUY	1611198	68.47
VASCONEQ	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1228706	68.97
VASCONEQ	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1228706	68.91
VINEETLAB	AMIT KUMAR JAIN HUF	SELL	48779	39.95
VINEETLAB	AMIT KUMAR JAIN HUF	BUY	66297	40.33
VINEETLAB	CHINTHAKUNTA SULOCHANA	BUY	63644	39.46
VINEETLAB	VENKATA RAMANA GADDAM	SELL	50000	39.96
VMSTMT	SOMANI STOCK BROKING PVT LTD	SELL	300000	81.44

Block Deals

Stock	Client Name	Action	Quantity Traded	Weighted Avg Price
NIBE	AEGIS INVESTMENT FUND	SELL	2,77,877	1,451.00
NIBE	VENUS INVESTMENTS VCC - VENUS STELLAR FUND	BUY	2,77,877	1,451.00

Insider Trading

Stock	Name of the Acquirer/ Disposer	Action	% shareholding Prior	% shareholding Post
PROZONER	APAX TRUST	Buy	30.01	31.17
POWERMECH	POWER MECH INFRA LIMITED	Buy	0.55	0.6
GANECOS	Ganesha Employees Welfare Trust	Sell	0.14	0.13
GANECOS	Ganesha Employees Welfare Trust	Buy	0.13	0.15
GANECOS	Ganesha Employees Welfare Trust	Buy	0.12	0.13
GANECOS	Ganesha Employees Welfare Trust	Buy	0.13	0.13
GANECOS	Ganesha Employees Welfare Trust	Buy	0.12	0.14
GANECOS	Ganesha Employees Welfare Trust	Sell	0.13	0.12
RPTECH	Priyanka Kapal Pansari	Buy	0.05	0.07
RPTECH	Priyanka Kapal Pansari	Buy	0.09	0.11
RPTECH	Priyanka Kapal Pansari	Buy	0.07	0.09
SAHANA	Hetal Pratikbhai Kakadiya	Buy	2.86	2.88
HCLTECH	Nandita Nanda	Sell	0	0
HCLTECH	Nandita Nanda	Sell	0	0
HCLTECH	JAGADESHWAR GATTU	Buy	0	0.01

Stock	Name of the Acquirer/ Disposer	Action	% shareholding Prior	% shareholding Post
HCLTECH	Rajeev Kumar	Buy	0	0
HCLTECH	Nandita Nanda	Sell	0	0
HCLTECH	Sachin Bhatnagar	Buy	0	0
HCLTECH	Sachin Bhatnagar	Buy	0	0
JSWENERGY	JSW Energy Employees Welfare Trust	Sell	0.07	0.07
JSWENERGY	JSW Energy Employees Welfare Trust	Sell	0.07	0.07
JSWENERGY	JSW Energy Employees Welfare Trust	Sell	0.07	0.07
JSWENERGY	JSW Energy Employees Welfare Trust	Sell	0.07	0.07
JSWENERGY	JSW Energy Employees Welfare Trust	Sell	0.07	0.07
ICICIGI	Sohel Golwalla	Buy	0	0
ICICIGI	Sohel Golwalla	Pledge	0	0
ICICIGI	Sohel Golwalla	Buy	0	0
ICICIGI	Sohel Golwalla	Pledge	0	0
SAHANA	Hetal Pratikbhai Kakadiya	Buy	2.81	2.86
AAATECH	RUCHI AGARWAL	Sell	14.97	9.67
JUBLPHARMA	Jubilant Employees Welfare Trust	Buy	0.58	0.6
JUBLPHARMA	Jubilant Employees Welfare Trust	Buy	0.6	0.63
JUBLPHARMA	Jubilant Employees Welfare Trust	Buy	0.55	0.58
HITECH	MANOJ KUMAR GUPTA, TRUSTEE HI-TECH PIPES EMPLOYEES WELFARE TRUST	Buy	0.19	0.19
SUDARSCHEM	Naveen Arya	Sell	0	0
SUDARSCHEM	Kushal Chakraborty	Sell	0	0
RPTECH	Gazal Chaman Pansari	Buy	0.05	0.06
RPTECH	Gazal Chaman Pansari	Buy	0.04	0.05
JAYAGROGN	Subhash V. Udeshi	Buy	0.15	6.32
JAYAGROGN	Vikram V. Udeshi	Buy	0.11	6.28
JAYAGROGN	Varun A. Udeshi	Buy	0.03	6.2
JAYAGROGN	Dhayvat H. Udeshi	Buy	0.03	6.2
JAYAGROGN	Sandeep S. Udeshi	Buy	0	6.17
JAYAGROGN	Bharat M. Udeshi	Buy	0.27	6.44
JAYAGROGN	Hitesh J. Udeshi	Buy	1.37	7.54

Stock	Name of the Acquirer/ Disposer	Action	% shareholding Prior	% shareholding Post
JAYAGROGN	Abhay V. Udeshi, Vikram V. Udeshi and Hemant V. Udeshi on behalf of Abhay V. Udeshi Family Trust	Buy	0	0.5
JAYAGROGN	Hemant V. Udeshi, Vikram V. Udeshi and Abhay V. Udeshi on behalf of Hemant V. Udeshi Family Trust	Buy	0	0.5
JAYAGROGN	Subhash V. Udeshi, Vikram V. Udeshi and Abhay V. Udeshi on behalf of Subhash V. Udeshi Family Trust	Buy	0	0.5
JAYAGROGN	Vikram V. Udeshi, Abhay V. Udeshi and Hemant V. Udeshi on behalf of Vikram V. Udeshi Family Trust	Buy	0	0.5
JAYAGROGN	Varun A. Udeshi, Vikram V. Udeshi and Abhay V. Udeshi on behalf of Varun A. Udeshi Family Trust	Buy	0	0.5
JAYAGROGN	Dhayvat H. Udeshi, Abhay V. Udeshi and Vikram V. Udeshi on behalf of Dhayvat H. Udeshi Family Trust	Buy	0	0.5
JAYAGROGN	Sandeep S. Udeshi, Abhay V. Udeshi and Vikram V. Udeshi on behalf of Sandeep S. Udeshi Family Trust	Buy	0	0.5
JAYAGROGN	Bharat M. Udeshi, Vikram V. Udeshi and Abhay V. Udeshi on behalf of Bharat M. Udeshi Family Trust	Buy	0	0.5
JAYAGROGN	Hitesh J. Udeshi, Vikram V. Udeshi and Abhay V. Udeshi on behalf of Jayraj G. Udeshi Family Trust	Buy	0	0.5
JAYAGROGN	Hemant V. Udeshi	Buy	0.18	6.35
JAYAGROGN	Abhay V. Udeshi	Buy	0.73	6.9
JAYAGROGN	Mr. Sudhir V. Udeshi, Mr. Hemant V. Udeshi and Mr. Hitesh V. Udeshi on behalf of Udeshi Trust	Sell	60.03	0
M&MFIN	Mahindra & Mahindra Financial Services Limited Employees' Stock Option Trust	Sell	0.05	0.05
AFFLE	Affle (India) Limited Employees Welfare Trust	Sell	0.11	0.11
M&M	Sriram Ramachandran	Sell	0	0
M&M	Sriram Ramachandran	Sell	0	0
KEI	Kali Charan Sharma	Buy	0.09	0.09
KEI	Dilip Kumar Barnwal	Buy	0.04	0.04
KEI	Pawan Kumar Jain	Buy	0.08	0.08
KEI	Jashobant Singha Ray	Buy	0.02	0.02
KEI	Daya Nand Sharma	Buy	0.01	0.01
KEI	Nawal Singh Yadav	Buy	0	0
KEI	Kishore Kunal	Buy	0.05	0.05
KEI	Adarsh Kumar Jain	Buy	0.04	0.04
KEI	Lalit Sharma	Buy	0.09	0.1
KEI	Rajeev Gupta	Buy	0.39	0.4
KEI	Manoj Kakkar	Buy	0.06	0.07
APOLLOHOSP	K VISHWESHWAR REDDY	Pledge	1.1	1.1
ORIENTBELL	ALFA MERCANTILE LIMITED	Buy	0.77	0.78
CHANDAN	PRAGYA SINGH	Sell	0.1	0

Stock	Name of the Acquirer/ Disposer	Action	% shareholding Prior	% shareholding Post
HCG	Ashwini P K	Sell	0.01	0.01
HCG	SUNU MANUEL	Pledge	0.07	0.07
HCG	Venkataramanan P	Sell	0.04	0.04
HCG	Punitha Rani Singh	Sell	0.01	0
HDBFS	Nanda Kumar S	Sell	0.01	0.01
HDBFS	Ritesh Sharma	Sell	0.02	0.01
HDBFS	Ritesh Sharma	Sell	0.02	0.02
HDBFS	Rohit Bhatnagar	Sell	0	0
HDBFS	Rohit Bhatnagar	Sell	0	0
HDBFS	Premal Brahmhatt	Sell	0	0
LALPATHLAB	MRINAL KAPOOR	Sell	0	0
LALPATHLAB	Dr. Lal PathLabs Employees Welfare Trust	Sell	0.37	0.37
NAUKRI	Rajiv Gidla	Sell	0	0
RACE	Anil kumar Behl	Buy	0.68	0.74
CONTROLPR	LATE PUSHPA KABRA	Sell	0.16	0
CONTROLPR	SHIVA BASANT KABRA	Buy	9.93	10.09
CHEMBONDCH	Nirmal V. Shah	Buy	13.42	13.44
CHEMBONDCH	Nirmal V. Shah	Buy	13.4	13.42
SGLTL	RADHIKA NANNAPANENI	Buy	0.07	0.07
SGLTL	RADHIKA NANNAPANENI	Buy	0.07	0.07
SGLTL	RADHIKA NANNAPANENI	Buy	0.07	0.07
INNOVACAP	Gian Parkash Aggarwal	Pledge	10.8	10.8
SPECIALITY	Anjan Chatterjee	Buy	25.28	25.29
SPECIALITY	Anjan Chatterjee	Buy	25.29	25.39
INNOVACAP	Gian Parkash Aggarwal	Pledge	10.8	10.8
SHAREINDIA	Neeru Aggarwal	Buy	0	0.03
SHAREINDIA	Sheetal Agarwal	Buy	0	0
SHAREINDIA	Meera Gupta	Buy	0	0.03
SALASAR	ALOK KUMAR	Sell	2.89	2.72
SALASAR	BASE ENGINEERING LLP	Sell	0.35	0.18
SALASAR	SHIKHAR FABTECH PVT LTD	Sell	3.73	3.5
BAJFINANCE	Bajaj Allianz General Insurance Co. Ltd.	Buy	0.01	0.01
RUBFILA	HARDIK B PATEL	Buy	8.37	8.38
RUBFILA	HARDIK B PATEL	Buy	8.38	8.39
JUBLINGREA	Jubilant Ingrevia Employees Welfare Trust	Sell	0.83	0.82

Event Calendar – Corporate Action (Financial Results/ Dividend/other business matters)

Company	Purpose
AGI	Fund Raising
CYBERMEDIA	Other business matters
JYOTISTRUC	Other business matters
SAMPANN	Other business matters
BIOCON	Other business matters
HEXT	Dividend
HEXT	Dividend
HEXT	Dividend
KRISHIVAL	Fund Raising/Other business matters
NAGREEKEXP	Fund Raising/Other business matters
NGIL	Other business matters
UTKARSHBNK	Fund Raising

News Section

Stock News

- Tata Motors Limited (CMP: 680.45, MCap: 2,50,560 Cr, Sector: Automobile, Valuation: 11.26x FY26 P/E)**
 Tata Motors acquired a 17% stake in Freight Tiger, a digital platform for freight and logistics, to bolster its supply chain and logistics capabilities, with an investment of ₹120 crore. Additionally, the company issued a notice to sensitize shareholders on KYC requirements and is set to demerge on October 1, 2025, with share entitlement ratios and record dates announced, though brokerages remain cautious about Jaguar Land Rover's recovery.
News Source: [TATAMOTORS](#)
- Bharat Heavy Electricals Limited (CMP: 238.45, MCap: 83,029 Cr, Sector: Electrical Equipment, Valuation: 26.01x FY26 EV/EBITDA)**
 BHEL received orders or contracts, with specifics undisclosed, signaling potential growth in its project pipeline. Additionally, it faced litigation or disputes, though detailed impacts were not provided.
News Source: [BHEL](#)
- Oil India Limited (CMP: 413.3, MCap: 67,227 Cr, Sector: Oil & Gas, Valuation: 6.68x FY26 EV/EBITDA)**
 Oil India Limited signed an MoU with GAIL (India) Limited to enhance collaboration across the natural gas value chain, aiming to strengthen operational synergies in exploration, production, and distribution.
News Source: [OIL](#)
- SJVN Limited (CMP: 90.35, MCap: 35,505 Cr, Sector: Power Generation & Distribution, Valuation: 25.97x TTM EV/EBITDA)**
 The company commenced commercial production/operations, though specifics such as the project or location were not detailed, marking an operational milestone likely to impact revenue generation.
News Source: [SJVN](#)
- G R Infraprojects Limited (CMP: 1222.65, MCap: 11,830 Cr, Sector: Infrastructure, Valuation: 11.23x FY26 EV/EBITDA)**
 The company acquired Rajgarh Neemuch Power Transmission Limited, enhancing its foothold in the power transmission sector with potential for increased revenue streams.
News Source: [GRINFRA](#)
- Softtech Engineers Limited (CMP: 369.2, MCap: 511 Cr, Sector: IT - Software, Valuation: 314.49x TTM P/E)**
 The company announced an acquisition, though specific details such as the target entity or financial terms were not fully disclosed, indicating a strategic expansion or diversification of its business portfolio.
News Source: [SOFTTECH](#)
- Azad Engineering Limited (CMP: 1561.2, MCap: 10,082 Cr, Sector: Engineering, Valuation: 54.25x TTM EV/EBITDA)**
 Azad VTC Private Limited received NADCAP accreditation, a prestigious certification for aerospace manufacturing, which validates its quality standards and could enhance its credibility and business prospects in the sector.
News Source: [AZAD](#)
- KPI Green Energy Limited (CMP: 438.65, MCap: 8,656 Cr, Sector: Renewable Energy, Valuation: 14.4x TTM EV/EBITDA)**
 KPI Group formed a strategic partnership with South Korea's Jeonbuk Province to advance the global green hydrogen ecosystem, aiming to develop sustainable energy solutions and expand market reach.
News Source: [KPIGREEN](#)

- Power Mech Projects Limited (CMP: 2707.75, MCap: 8,560 Cr, Sector: Infrastructure, Valuation: 10.96x FY26 EV/EBITDA)**
 The company provided guarantees or indemnity for a third party, though specific details of the arrangement or financial implications were not fully disclosed.
News Source: [POWERMECH](#)
- Pricol Limited (CMP: 533.8, MCap: 6,506 Cr, Sector: Auto Ancillary, Valuation: 28.63x FY26 P/E)**
 Pricol signed an MoU with BOE Varitronix Limited for a strategic partnership, likely focusing on automotive electronics, which could enhance its technological and market positioning.
News Source: [PRICOLLTD](#)
- CMS Info Systems Limited (CMP: 372.8, MCap: 6,131 Cr, Sector: IT – Software, Valuation: 14.07x FY26 P/E)**
 No specific operational news provided beyond investor presentation updates. Included here as per market cap ranking for reference.
News Source: [CMSINFO](#)
- KNR Constructions Limited (CMP: 198.4, MCap: 5,579 Cr, Sector: Infrastructure, Valuation: 6.13x FY26 EV/EBITDA)**
 The company received orders or contracts, though specific details such as project value or scope were not fully provided, indicating potential growth in its infrastructure project portfolio.
News Source: [KNRCON](#)
- Ashoka Buildcon Limited (CMP: 184.8, MCap: 5,187 Cr, Sector: Infrastructure, Valuation: 2.25x TTM EV/EBITDA)**
 The company sold/dispensed of stakes in SPVs held by itself and Ashoka Concessions Limited, indicating a strategic restructuring or divestment of non-core assets. Additionally, it made interest payments on NCDs, though specific financial impacts were not detailed.
News Source: [ASHOKA](#)
- Ceigall India Limited (CMP: 261.95, MCap: 4,563 Cr, Sector: Infrastructure, Valuation: 11.02x TTM EV/EBITDA)**
 The company received a Letter of Intent from Himachal Pradesh State Industrial Development Corporation Limited for a project, though specific details like value were not mentioned. Additionally, its subsidiary received the appointed date from NHAI for a ₹981 crore Ludhiana-Bathinda Greenfield Highway project, marking a significant milestone.
News Source: [CEIGALL](#)
- Optiemus Infracom Limited (CMP: 622, MCap: 5,486 Cr, Sector: Electronics, Valuation: 83.48x TTM P/E)**
 Optiemus signed a binding term sheet with Ordinary Theory LLC, USA, for a joint venture to manufacture and market 'Made in India' smart enterprise hardware and industrial solutions, aiming to strengthen its technological offerings.
News Source: [OPTIEMUS](#)
- EPACK Durable Limited (CMP: 347.8, MCap: 3,346 Cr, Sector: Consumer Durables, Valuation: 61.27x TTM P/E)**
 The company launched a new product, a vacuum cleaner, expanding its consumer durables portfolio and potentially tapping into new market segments.
News Source: [EPACK](#)
- Waaree Energies Limited**
 Waaree Energies commenced commercial production/operations, though specific details of the facility

or product were not provided, indicating an expansion in operational capacity.

News Source: [WAAREE](#)

- **Jindal Steel Limited**

Jindal Steel commissioned a new 3 MTPA Basic Oxygen Furnace at Angul, expanding its steelmaking capacity to 9 MTPA, a significant step in increasing production capabilities.

News Source: [JINDALSTEL](#)

Companies with Investor Presentation or Annual Report Entries

- **Rategain Travel Technologies Limited**

News Source: [RATEGAIN](#)

- **CMS Info Systems Limited**

News Source: [CMSINFO](#)

Macro/Non-Stock News

- **Tariffs bite, yet India Inc maintains its credit score**

Despite US tariffs and economic headwinds, Indian companies have largely maintained stable credit ratings in H1 FY26, with ICRA upgrading ratings of 214 firms and downgrading 75 (credit ratio of 2.9), while CRISIL's ratio eased to 2.17 but remains healthy.

News Source [News Source](#)

- **Home loan weakness a drag on retail credit**

Private banks are cautious on home loans due to margin pressure and delayed purchases by borrowers, with the HDFC-HDFC Bank merger's impact on last year's base effect also contributing to the slowdown.

News Source [News Source](#)

- **Donakanti family plans to sell ValueLabs at valuation of \$1 B**

The Donakanti family is exploring the sale of ValueLabs, an IT and consulting services company, targeting a billion-dollar deal valuation.

News Source [News Source](#)

- **RBI to continue to use overnight weighted average call rate as the operating target for monetary policy**

The Reserve Bank of India reaffirms using the overnight weighted average call rate to signal its policy stance, ensuring consistency in liquidity management.

News Source [News Source](#)

- **Rupee loan average rates fall by 6bps in August**

Average rates on rupee loans decreased by 6 basis points in August 2025, indicating softer borrowing conditions as per RBI data.

News Source [News Source](#)

- **Vedanta demerger date moved to March 2026 pending government approval**

Vedanta's demerger is postponed until March 2026 as it awaits regulatory clearance from government agencies.

News Source [News Source](#)

- **Cinema chain PVR INOX faces CCI investigation over fair trade breach**

PVR INOX is being probed by the Competition Commission of India regarding alleged unfair trade practices and anti-competitive conduct.

News Source [News Source](#)

- **ED provisionally attaches ₹15 crore worth of properties over GST fraud**
Enforcement Directorate attaches properties worth ₹15 crore in a case of GST evasion as investigations continue against suspects.
[News Source](#)
- **Pfizer gets three-year reprieve from Trump pharma tariffs**
Pfizer secures a three-year exemption from US pharma tariffs, easing cost and supply uncertainties, alongside plans to cut drug prices, launch 'TrumpRx' discounts, and invest \$70 billion in US R&D.
[News Source](#)
- **Centre plans revival of Border Wing Home Guards following Ladakh unrest and Pahalgam attack**
Indian government plans to revive a special paramilitary wing after security incidents in Ladakh and Pahalgam to strengthen border security.
[News Source](#)
- **China bans new BHP iron ore cargoes as pricing row grows**
China halts BHP iron ore imports amid disputes over pricing, impacting global supply chains as tensions with the Australian miner escalate.
[News Source](#)
- **India records best monsoon in 5 years, core agricultural zones receive 122% rainfall**
2025 marks India's best monsoon in half a decade, with key farmland receiving surplus rain, improving crop prospects and rural incomes, while IMD forecasts above-normal rainfall for October.
[News Source](#)
- **US starts deporting hundreds of Iranians after deal with Tehran**
Deportation of hundreds of Iranians begins under a new US-Iran agreement following diplomatic arrangements.
[News Source](#)
- **LG Electronics India IPO to open next week**
LG Electronics India is launching its IPO on October 7, with South Korea's parent company planning to sell over 10 crore shares via offer-for-sale, providing key investor details like subscription dates and price band.
[News Source](#)
- **What changes from Oct 1: Interest on advances, RBI cheque clearing norms & more**
Regulatory changes effective October 1, 2025, in India include updates to interest guidelines on advances, gold loans, cheque clearing processes by RBI, and revised bank service charges.
[News Source](#)
- **US govt shutdown: Will mass exits save \$28bn? Here's what Trump officials say**
Trump officials suggest a mass government exit during a US shutdown could save up to \$28 billion annually, sparking debates over public services and economic impacts.
[News Source](#)
- **'We'll probably have a shutdown': Trump on US government closure**
Donald Trump predicts a US government shutdown, blaming Democrats for risking closure by not acceding to demands on spending and border security.
[News Source](#)
- **Telecom spectrum auctions see little competition. Regulator proposes a fix**
With aggressive bidding cooling off, sector regulator Trai suggests opening auctions to internet and network providers to spur competition, diversify participation, and increase government revenues.
[News Source](#)

- **Kazakhstan launches state-run Alem Crypto Fund**
Kazakhstan establishes the Alem Crypto Fund, a government-backed vehicle for strategic cryptocurrency investments, including Binance Coin, signaling intent to diversify sovereign portfolio with digital assets.
[News Source](#)
- **PM Narendra Modi to attend RSS centenary event in Delhi tomorrow**
Prime Minister Modi will mark RSS's centenary on October 1, 2025, in Delhi, releasing a commemorative stamp and coin in honor of the organization's cultural and social influence.
[News Source](#)
- **Is Blue Star the discretionary play hiding in plain sight?**
Blue Star emerges as a potential top pick as a discretionary stock amid a sluggish market, supported by rising demand for air conditioners and a healthy order book in commercial refrigeration.
[News Source](#)
- **GST 2.0: E-Commerce platforms under govt scanner for price hikes on certain items despite tax cuts**
Government scrutinizes e-commerce platforms for not passing on GST rate cut benefits to consumers, considering regulatory action to ensure compliance especially during festive shopping.
[News Source](#)
- **Explainer: Why the rupee is hitting fresh lows**
The Indian rupee's depreciation is attributed to global factors like US dollar strength, oil price spikes, widened trade deficit, and FPI outflows, alongside cautious RBI intervention impacting inflation and trade.
[News Source](#)
- **Sept retail auto sales dip 13%, festive rush revives hopes**
September auto sales witnessed a 13% drop due to adverse weather and inventory concerns, but manufacturers anticipate a turnaround during the festive season with demand for cars and two-wheelers.
[News Source](#)
- **Trump built a tariff wall, Indian pharma found a European gate**
Despite US tariffs under Trump, Indian pharmaceutical firms pivoted to Europe, leveraging regulatory convergence and generic drug demand to reduce overdependence on US markets.
[News Source](#)
- **RCB sale talks intensify: Adar Poonawalla reportedly in talks to buy Royal Challengers Bengaluru IPL franchise**
Serum Institute CEO Adar Poonawalla is in advanced negotiations to acquire a majority stake in the RCB IPL team, potentially marking a major entry into cricket ownership amid high IPL valuations.
[News Source](#)
- **President Trump gives Hamas '3-4 days' to accept Gaza peace plan, if refused 'pay in hell'**
Trump issued a stern ultimatum to Hamas, giving 3-4 days to accept a US-mediated Gaza peace proposal or face severe consequences, stirring global debates on Middle East peace negotiations.
[News Source](#)
- **EFTA trade pact effective today: Investment, services major gains for India**
The India-EFTA free trade agreement comes into effect, boosting market access for Indian goods, European FDI, and services exports in sectors like IT, pharma, and engineering.
[News Source](#)

- TCS Layoffs: How real are the speculations of 80,000 employees? Company says ‘the impact is...’**
 TCS clarified layoff rumors involving 80,000 employees, stating the actual number affected is far lower and emphasizing reskilling efforts with moderate business impact.
[News Source](#)
- Only 20% of India’s waste gets treated – Could these 3 stocks turn trash into opportunity?**
 With India treating only 20% of its waste, three listed waste management companies with proven tech and contracts are poised to capitalize on mandatory processing rules and urban infrastructure growth.
[News Source](#)
- Nifty 50, BSE Sensex and Gold: Market and rate movements as of Sep 30, 2025**
 Nifty 50 closed at 24,611 (down 0.1%), BSE Sensex at 80,267 (down 0.1%), and gold at 11,554 (down 0.6%), with gainers like Hero MotoCorp and losers including ITC and Bharti Airtel.
[News Source](#)
- The Great Stimulus: Will GST rate cut spur a consumption boom?**
 India’s GST rationalisation aims to boost consumption and growth, with debates on whether tax cuts will increase spending or be muted by savings behavior, as per policy and industry perspectives.
[News Source](#)
- ‘I was very honoured’: Trump says Asim Munir praised him for stopping India-Pakistan war**
 Donald Trump claims Pakistan’s Army Chief Asim Munir praised his role in preventing a war with India during the 2019 standoff, asserting he saved millions of lives.
[News Source](#)
- India’s fiscal deficit widens to Rs 5.98 trillion in April–August**
 Fiscal deficit for April–August 2025 reached Rs 5.98 trillion, reflecting slower GST revenue growth of 5.2% versus an 11.3% target, posing challenges for government finances.
[News Source](#)
- Sensex sinks 2,746 pts in 8-day slide, Nifty below 24,650 ahead of RBI policy review**
 Indian equities saw Sensex drop 2,746 points over eight days and Nifty fall below 24,650, driven by caution ahead of RBI’s policy review and global economic concerns.
[News Source](#)
- USCIS hiring immigration officers to protect the nation’s immigration system amid reforms**
 USCIS is recruiting immigration officers to enhance national security and efficiency, potentially reducing visa backlogs and streamlining processes for Indian aspirants.
[News Source](#)
- Trump tariff: Welspun Living shares down 30% YTD; Pakistan, Turkey no threat; key triggers**
 Welspun Living’s stock dropped 30% YTD amid concerns over Trump’s proposed 100% US tariffs, though analysts see no major threat from Pakistan or Turkey, focusing on profit pressure.
[News Source](#)
- BEL tops Sumeet Bagadia’s Dussehra 2025 pick with a target of Rs 480**
 BEL is recommended as a top investment pick for Dussehra with a target of Rs 480, supported by technical analysis showing a Flag and Pole pattern and positive RSI.
[News Source](#)
- Jinkushal Industries IPO: Check application status, odds of allotment, latest GMP & more**
 Jinkushal Industries IPO garners attention with details on allotment timelines, grey market premium, and retail success probability post-subscription closure.
[News Source](#)

- **Tata Sons listing deadline expires**

Tata Sons, holding company of Tata Group, faces expiry of its public listing deadline, with RBI's next steps under scrutiny after its 'upper-layer' NBFC classification.

[News Source](#)

- **Nine killed in accident at Ennore power station: Reports**

Nine people were reported dead in an industrial accident at Ennore Thermal Power Station near Chennai, prompting official investigations into safety norms at power plants.

[News Source](#)

- **BPCL to soon start work on refinery-cum-petrochemicals project in AP: N Chandrababu Naidu**

Andhra Pradesh CM N. Chandrababu Naidu announced that BPCL will soon begin a major refinery and petrochemicals project in the state, expected to spur industrial growth and jobs.

[News Source](#)

- **BEL eyes 25 GW renewable capacity by 2030**

Bharat Electronics Limited plans to achieve 25 GW of renewable energy capacity by 2030, supporting India's clean energy push as reported during its annual general meeting.

[News Source](#)

- **FSIB recommends R. Chander for MD's position in LIC**

The Financial Services Institutions Bureau recommended R. Chander for the role of Managing Director at LIC, pending further government approval as part of succession planning.

[News Source](#)

- **Sharp surge in silver prices boost Hindustan Zinc's outlook**

Hindustan Zinc, a major silver producer, stands to benefit from a sharp rally in silver prices, expecting strengthened financials from the upward price trend.

[News Source](#)

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