ventura

Daily Updates

Market Commentary

Overnight global action:

On 22nd September 2026, US markets ended mixed, with the S&P 500 remaining flat, declining marginally by 0.1 pts (0.00%), Dow Jones falling by 185.1 pts (-0.36%), while Nasdaq 100 advanced by 250.0 pts (+0.82%). Gift Nifty declined by 64.0 pts (-0.27%), indicating a cautious opening for Indian markets.

NSE breadth remained negative with 1,677 advances against 1,867 declines, while BSE witnessed 2,087 advances versus 2,279 declines.

Index Options Data Analysis:

Nifty OI peaks at 23,400 Calls and 23,300 Puts. PCR stands at 0.92.
Sensex OI peaks at 76,000 Calls and 71,000 Puts. PCR stands at 1.13.
Bank Nifty OI peaks at 58,000 Calls and 57,500 Puts. PCR stands at 1.07.

Securities in Ban for F&O Trade:

KAYNES, LICHSGFIN, MANAPPURAM, SAIL

Sector Performance:

NIFTY MICROCAP 250 index grew by 0.41 % driven by OPTIEMUS(+20.00%), TRANSRAILL(+14.44%), BLUESTONE(+11.42%)

NIFTY MIDCAP SELECT index grew by 0.28 % driven by SWIGGY(+4.16%), BSE(+2.34%), BHARATFORG(+2.04%)

NIFTY SMALLCAP 100 index grew by 0.04 % driven by MEESHO(+9.79%), IKS(+5.45%), RBLBANK(+5.17%)

NIFTY SMLCAP 50 index declined by -0.44 % dragged by KAYNES(-5.34%), AEGISLOG(-4.78%), PGEL(-3.05%)

NIFTY NEXT 50 index declined by -0.39 % dragged by LTM(-2.84%), BRITANNIA(-2.09%), ABB(-2.07%)

NIFTY 100 index declined by -0.37 % dragged by LTM(-2.84%), BRITANNIA(-2.09%), ABB(-2.07%)

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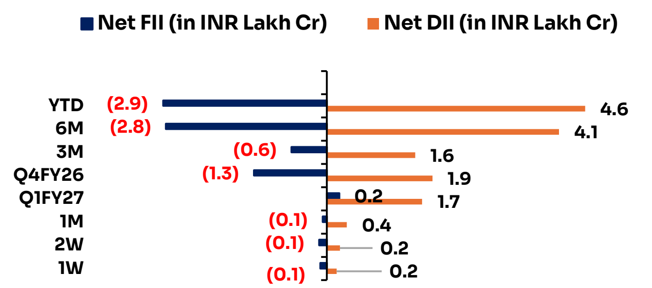
Fund Flow - 23rd Sep 2026	Buy	Sell	Net
FII/FPI (INR Cr)	9,845.8	13,655.8	-3,810.0
DII (INR Cr)	14,599.7	10,479.7	4,120.1



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	23,336	-0.27%	-11.19%	21.2
Sensex 30	74,529	-0.44%	-12.55%	19.5
Nifty 50	23,329	-0.36%	-10.72%	21.2
India VIX	11	-2.36%	15.91%	
Nifty Bank	56,216	-0.45%	-5.65%	16.5
Nifty Next 50	71,804	-0.39%	3.52%	71.8
Nifty 500	22,794	-0.29%	-4.51%	21.4
Nifty Mid 100	61,963	-0.08%	2.44%	31.9
Nifty Small 250	18,261	-0.10%	9.44%	30.7
USD/INR	95.6	0.00%	6.27%	
India 10Y	7.0%			
India 2Y	6.4%			
India 1Y	6.2%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,765	0.00%	13.43%	33.6
Dow Jones	51,864	-0.36%	7.91%	25.0
Nasdaq 100	30,732	0.82%	21.71%	50.5
FTSE 100	10,708	-0.29%	7.82%	16.9
CAC 40	8,155	0.20%	0.07%	23.9
DAX	25,579	0.02%	4.44%	26.7
Nikkei 225	65,019	1.38%	29.16%	34.7
Hang Seng	25,088	0.18%	-2.12%	12.2
Shanghai Comp	3,952	0.06%	-0.42%	17.9
KOSPI	7,108	1.28%	68.76%	35.2
S&P/ASX 200	8,782	0.27%	0.79%	23.2

Stocks in the News

PURAVANKARA (CMP: 228, MARKET CAP: 5400 Cr., SECTOR: REAL ESTATE)

NSE Filing

Entered Delhi-NCR market by securing a 13.44-acre land parcel in Greater Noida.The project has an estimated GDV potential of ₹5,200 crore.The acquisition expands Puravankara's presence beyond its existing Bengaluru and Mumbai-focused portfolio.

STERLING & WILSON RENEWABLE ENERGY (CMP: 178, MARKET CAP: 4168 Cr., SECTOR: RENEWABLE ENERGY / SOLAR EPC)

NSE Filing

Secured domestic and international renewable-energy orders worth over ₹985 crore.The order book includes a 534.3 MWp Rajasthan solar project and a 616 MWh BESS order in South Africa.The contracts strengthen the company's solar EPC and energy-storage pipeline. (Screener)

NEOGEN CHEMICALS (CMP: 2379, MARKET CAP: 7152 Cr., SECTOR: SPECIALTY CHEMICALS)

NSE Filing

Completed its first-ever QIP issue, raising approximately ₹600 crore.The issue was reportedly oversubscribed 6.5x, indicating strong institutional participation.The funds will strengthen balance sheet capacity and support future growth initiatives. (Screener)

GPT INFRAPROJECTS (CMP: 118, MARKET CAP: 1493 Cr., SECTOR: INFRASTRUCTURE / RAILWAYS)

NSE Filing

Received orders/contracts worth ₹483.72 crore.The order includes railway infrastructure work, strengthening its railway EPC order pipeline.The company also received a separate L1 position for a ₹21.21 crore Western Railway signalling contract. (Screener)

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	27,086	-0.24%	-3.91%	22.3
Nifty IT	28,582	-0.86%	-24.55%	22.3
Nifty Fin Ser	25,418	-0.42%	-7.95%	16.6
Nifty Pharma	26,910	-0.41%	18.42%	44.3
Nifty Services	29,971	-0.30%	-10.95%	33.0
Nifty Cons Dur	37,962	-0.64%	3.28%	51.4
Nifty PSE	9,617	0.13%	-2.40%	10.1
Nifty FMCG	45,658	-0.53%	-17.70%	31.4
Nifty Pvt Bank	27,286	-0.31%	-5.00%	10.2
Nifty PSU Bank	8,271	-0.49%	-3.07%	13.5
Nifty Cons	11,487	-0.19%	-6.53%	40.6
Nifty Energy	37,727	-0.24%	6.80%	12.0
Nifty Health	16,720	-0.46%	14.21%	40.0
Nifty India Mfg	15,890	-0.34%	3.10%	29.6
Nifty Metal	12,990	0.14%	16.32%	23.3
Nifty Oil & Gas	10,959	-0.43%	-10.40%	16.8

Derivatives Position (Combined)		
Stock	**% Chg OI**	**%Chg LTP**
Long		
RBLBANK	12.6	5.2
PATANJALI	6.5	1.7
PIIND	5.1	2.8
BPCL	4.7	0.1
LODHA	4.1	0.2
Short		
KAYNES	42.4	-6.6
ATHERENERG	14.5	-3.0
IRFC	10.6	0.0
BRITANNIA	9.5	-2.5
PREMIERENE	8.5	-0.8
Long Unwinding		
OIL	-3.2	-2.5
GRASIM	-3.1	-1.0
ICICIGI	-2.4	-1.3
FORTIS	-2.0	-0.2
LUPIN	-2.0	-0.2
Short Covering		
SOLARINDS	-5.0	3.6
BANDHANBNK	-4.3	2.5
BSE	-4.1	2.4
WIPRO	-3.2	1.1
MANKIND	-2.8	1.9

EMBASSY DEVELOPMENTS (CMP: 58, MARKET CAP: 8120 Cr., SECTOR: REAL ESTATE)

NSE Filing

Signed an MoU for sale of an entire residential tower at Embassy Terrazza, Juhu.The transaction value is ₹711 crore with the buyer being Dinesh Thakkar, Founder & CMD of Angel One.The deal highlights monetisation of premium residential inventory. (The Economic Times)

Commodities	CMP	1D	YTD
Gold ($)	4,476	0.11%	3.67%
Silver ($)	67.3	0.48%	-7.0%

Currency	CMP	1D	YTD
USD/INR	95.6	0.00%	6.27%
EUR/INR	109.9	-0.09%	4.04%
GBP/INR	127.8	-0.11%	5.57%
JPY/INR	0.6	0.06%	5.87%
EUR/USD	1.2	0.01%	-1.04%

Securities Lending & Borrowing Scheme

Company	Under.Ltp	Fut.Ltp	Spread (%)
KAYNES	3,455.00	3,421.20	0.98
LUPIN	2,135.00	2,118.00	0.80
PREMIERENE	907.20	900.10	0.78
KFINTECH	898.00	891.25	0.75
PIIND	2,410.00	2,394.00	0.66

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
LAURUSLABS	2,007	2,033	2,024	21-Sep-26
JSWINFRA	369	376	357	18-Sep-26
APARINDS	18,289	19,265	19,128	21-Sep-26
RBLBANK	423	424	420	9-Sep-26
ACMESOLAR	455	477	464	21-Sep-26

52 Week Low

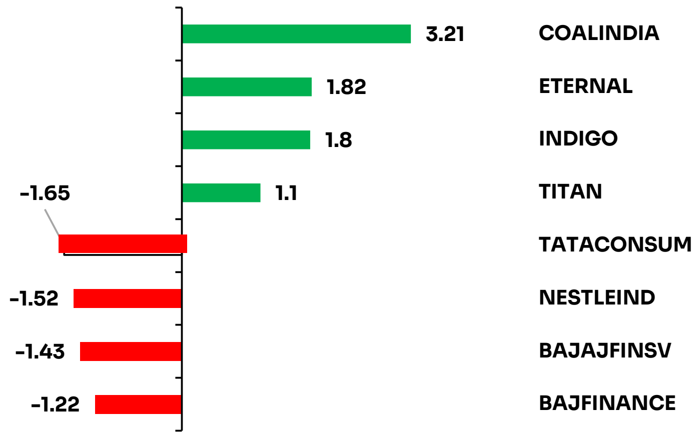
Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
WIPRO	166	163	163	18-Sep-26
BRITANNIA	4,918	4,915	4,933	16-Sep-26
TATACONSUM	984	984	986	15-Sep-26
VOLTAS	1,101	1,100	1,111	18-Sep-26
UBL	1,218	1,210	1,214	17-Sep-26

Volume Shockers

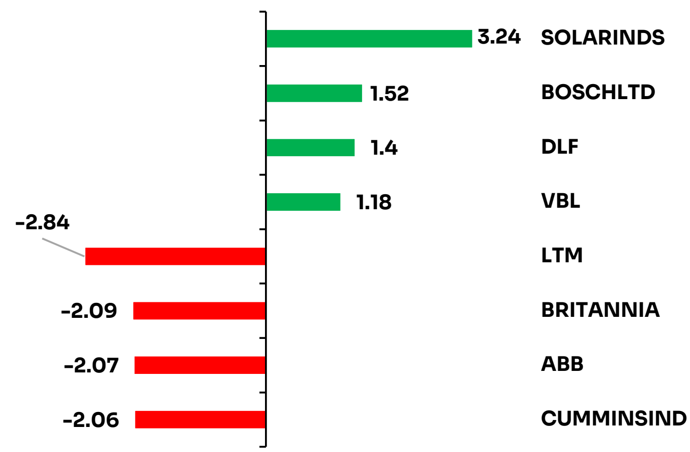
Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
SHIVAUM	682	1	94	514
RHIM	34,824	113	172	379
UNIONGOLD	401	3	3	151
TRANSRAILL	23,972	320	404	474
GANDHITUBE	316	6	5	1,000
UNIECOM	13,826	261	256	86
PACEDIGITK	26,736	523	693	169
REGAAL	8,177	218	203	99
ITDC	3,481	95	1,209	708
3PLAND	86	3	4	31
GABRIEL	7,891	243	188	1,478
OPTIFIN	1,437	46	45	17
GKB	86	3	5	68
JAINREC	15,630	605	972	291
MITCON	79	4	12	80
AVTNPL	4,546	221	222	99
HGM	67	3	4	42
ADDIND	1	0	1	75
TANAA	966	52	41	365
SINTERCOM	38	2	22	81
SSDL	490	28	104	65
MONEYBOXX	515	31	217	58
ARVEE	230	15	32	233
RHETAN	5,521	356	7,527	18
CRESTO	200	13	25	19

Top Gainers & Losers

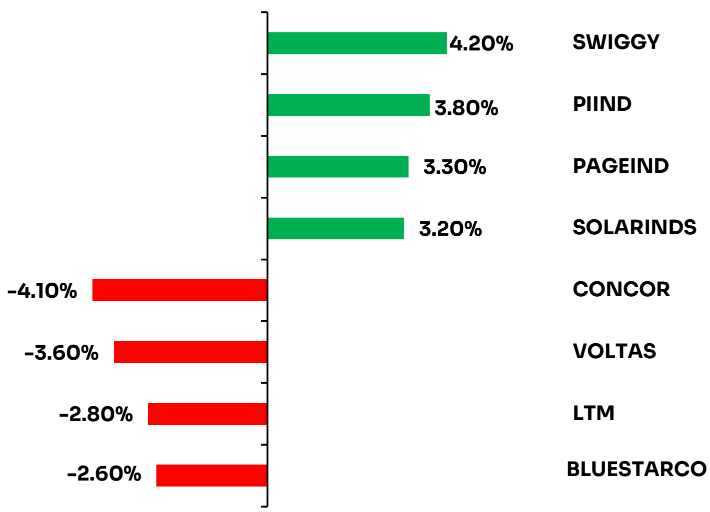
Nifty 50



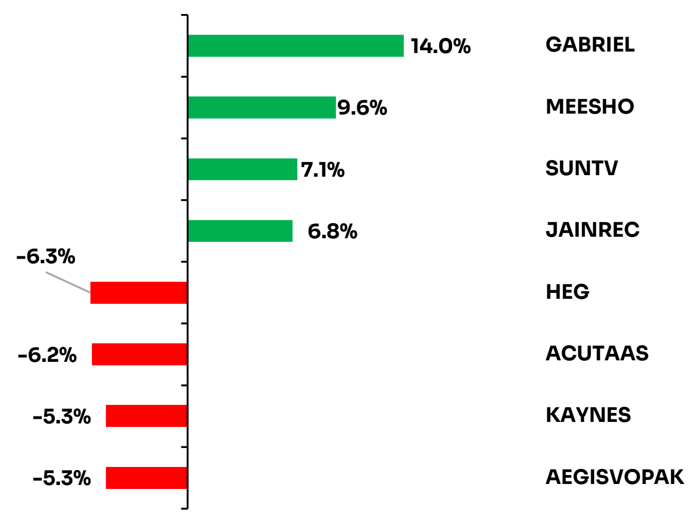
Nifty Next 50



Nifty 200



Nifty 500



Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
AASTHA	L7 HITECH PRIVATE LIMITED	BUY	208	82
AASTHA	L7 HITECH PRIVATE LIMITED	SELL	221	82
AHCL	HRTI PRIVATE LIMITED	SELL	5090	28
AHCL	HRTI PRIVATE LIMITED	BUY	5121	28
AHCL	NEO APEX SHARE BROKING SERVICES LLP	BUY	3331	29
AHCL	NEO APEX SHARE BROKING SERVICES LLP	SELL	4573	29
AHCL	QE SECURITIES LLP	SELL	2922	28
AHCL	QE SECURITIES LLP	BUY	2951	28
ATALREAL	HRTI PRIVATE LIMITED	BUY	1870	13
ATALREAL	HRTI PRIVATE LIMITED	SELL	2007	13
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	SELL	360	13
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	BUY	720	13
ATALREAL	QE SECURITIES LLP	SELL	941	13
ATALREAL	QE SECURITIES LLP	BUY	943	13
CAPINVIT	HSBC MUTUAL FUND	BUY	4500	77
CAPINVIT	LARSEN & TOUBRO LIMITED	SELL	6492	77
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	SELL	333	303
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	BUY	365	303
CRESTO	HEMANT BHOOT HUF	BUY	79	19
CUBEXTUB	INDRA KIRAN VENTURES	BUY	75	105
DHTL	GOUTHAMCHANDSIMPAL	SELL	25	28
DHTL	RAMESH KUMAR JAIN	BUY	24	28
FEDDERSHOL	ACME CAPITAL MARKET LIMITED	SELL	1051	66
FEDDERSHOL	ACME CAPITAL MARKET LIMITED	BUY	1100	66
FEDDERSHOL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	2121	69
FEDDERSHOL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	2121	69
FEDDERSHOL	ASHUTOSH DHIRENDRAKUMAR MANIAR	BUY	843	70
FEDDERSHOL	ASHUTOSH DHIRENDRAKUMAR MANIAR	SELL	1051	67
FEDDERSHOL	HJS SECURITIES PRIVATE LIMITED	SELL	1505	66
FEDDERSHOL	HJS SECURITIES PRIVATE LIMITED	BUY	1519	66
FEDDERSHOL	HRTI PRIVATE LIMITED	BUY	1533	70
FEDDERSHOL	HRTI PRIVATE LIMITED	SELL	1550	70
FEDDERSHOL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1249	69
FEDDERSHOL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1274	69
FEDDERSHOL	MATALIA STOCK BROKING PRIVATE LIMITED	BUY	1049	70
FEDDERSHOL	MATALIA STOCK BROKING PRIVATE LIMITED	SELL	1051	70
FEDDERSHOL	MICROCURVES TRADING PRIVATE LIMITED	SELL	1736	69
FEDDERSHOL	MICROCURVES TRADING PRIVATE LIMITED	BUY	1736	69
FEDDERSHOL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1554	69
FEDDERSHOL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1554	69
FEDDERSHOL	PLASTOMATIC PACKAGING PRIVATE LIMITED	SELL	1204	68
FEDDERSHOL	PLASTOMATIC PACKAGING PRIVATE LIMITED	BUY	1204	68
FEDDERSHOL	QE SECURITIES LLP	BUY	2486	70
FEDDERSHOL	QE SECURITIES LLP	SELL	2487	69
FISCHER	L7 HITECH PRIVATE LIMITED	BUY	305	33
FISCHER	L7 HITECH PRIVATE LIMITED	SELL	6437	33
FISCHER	TRADE SOLVENT PRIVATE LIMITED	BUY	6437	33
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	SELL	157	628
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	BUY	192	626
GCSL	NISHANT PITTI	SELL	135	626

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
GCSL	NISHANT PITTI	SELL	135	626
GKSL	L7 HITECH PRIVATE LIMITED	BUY	100	175
GKSL	L7 HITECH PRIVATE LIMITED	SELL	425	175
GLASSWALL	ARUN GODAWAT	BUY	540	309
GLASSWALL	ARUN GODAWAT	SELL	540	308
GLASSWALL	ASHWIN STOCKS AND INVESTMENT PRIVATE LIMITED	SELL	477	309
GLASSWALL	ASHWIN STOCKS AND INVESTMENT PRIVATE LIMITED	BUY	477	309
GLASSWALL	BLITZQUANT RESEARCH LLP	BUY	508	307
GLASSWALL	BLITZQUANT RESEARCH LLP	SELL	508	307
GLASSWALL	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	BUY	1351	308
GLASSWALL	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	SELL	1351	309
GLASSWALL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	2052	308
GLASSWALL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	2052	308
GLASSWALL	GOLDMINE STOCKS PRIVATE LIMITED	BUY	714	308
GLASSWALL	GOLDMINE STOCKS PRIVATE LIMITED	SELL	714	308
GLASSWALL	GRT STRATEGIC VENTURES LLP	BUY	631	307
GLASSWALL	GRT STRATEGIC VENTURES LLP	SELL	631	308
GLASSWALL	HRTI PRIVATE LIMITED	SELL	242	307
GLASSWALL	HRTI PRIVATE LIMITED	BUY	490	310
GLASSWALL	IRAGE BROKING SERVICES LLP	SELL	1156	309
GLASSWALL	IRAGE BROKING SERVICES LLP	BUY	1320	308
GLASSWALL	J4S FINANCIAL SOLUTIONS LLP	BUY	485	311
GLASSWALL	J4S FINANCIAL SOLUTIONS LLP	SELL	485	312
GLASSWALL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	2973	307
GLASSWALL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	2973	310
GLASSWALL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1592	308
GLASSWALL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1601	308
GLASSWALL	MARWADI CHANDARANA INTERMEDIARIES BROKERS PR	BUY	758	308
GLASSWALL	MARWADI CHANDARANA INTERMEDIARIES BROKERS PR	SELL	758	308
GLASSWALL	MATHISYS QUANTCAP LLP	SELL	958	308
GLASSWALL	MATHISYS QUANTCAP LLP	BUY	969	308
GLASSWALL	MICROCURVES TRADING PRIVATE LIMITED	BUY	2112	310
GLASSWALL	MICROCURVES TRADING PRIVATE LIMITED	SELL	2112	310
GLASSWALL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1920	308
GLASSWALL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1920	308
GLASSWALL	PLUTUS RESEARCH PRIVATE LIMITED	SELL	564	308
GLASSWALL	PLUTUS RESEARCH PRIVATE LIMITED	BUY	572	308
GLASSWALL	PLUTUS WEALTH MANAGEMENT LLP	BUY	3811	308
GLASSWALL	PLUTUS WEALTH MANAGEMENT LLP	SELL	3811	308
GLASSWALL	QE SECURITIES LLP	SELL	1016	308
GLASSWALL	QE SECURITIES LLP	BUY	1056	307
GLASSWALL	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	443	307
GLASSWALL	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	443	308
GLASSWALL	SIMPY PRUTHI	SELL	524	307
GLASSWALL	SIMPY PRUTHI	BUY	524	307
JALAN	AMITA SINGH	SELL	99	2
JALAN	KRISHAN KUMAR	BUY	93	2
KAYNES	GRAVITON RESEARCH CAPITAL LLP	BUY	411	3507
KAYNES	GRAVITON RESEARCH CAPITAL LLP	SELL	414	3507

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
KSHITIJPOL	SATISH MEJIYATAR	SELL	2277	5
KSHITIJPOL	SATISH MEJIYATAR	BUY	2612	5
LUMINO	HRTI PRIVATE LIMITED	BUY	1664	109
LUMINO	HRTI PRIVATE LIMITED	SELL	1867	111
MAGSON	RAJESH EMMANUEL FRANCIS	SELL	125	180
MAGSON	RISING CORPORATION LLP	BUY	125	180
MAZDA	CROLL REYNOLDS INTERNATIONAL INC	SELL	243	244
MAZDA	SHARMIN NASSER	BUY	160	243
MGEL	SPECIFIC WORLDWIDE LLP	SELL	5000	16
MGEL	VELOCE OPPORTUNITIES FUND	BUY	1925	16
MOS	ASHOK INVESTORS TRUST LIMITED	SELL	13564	7
MOS	DAKSH AGARWAL	BUY	1400	7
MOS	MEGHA AGRAWAL	BUY	3352	7
MOS	SB OPPORTUNITIES FUND I	BUY	3864	7
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	BUY	12892	18
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	SELL	15097	18
MVELECTRO	HRTI PRIVATE LIMITED	SELL	149	878
MVELECTRO	HRTI PRIVATE LIMITED	BUY	158	877
NGIL	BHAVIN S KAMANI	BUY	137	39
OPTIFIN	NIRAJ UMESH JOSHI	SELL	508	17
OPTIFIN	NIRAJ UMESH JOSHI	BUY	559	17
PACEDIGITK	MICROCURVES TRADING PRIVATE LIMITED	BUY	1335	171
PACEDIGITK	MICROCURVES TRADING PRIVATE LIMITED	SELL	1335	171
PACEDIGITK	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1238	171
PACEDIGITK	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1238	171
PCJEWELLER	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	53895	13
PCJEWELLER	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	53895	13
PRESSTONIC	HI GROWTH CORPORATE SERVICES PVT LTD	SELL	82	40
PRESSTONIC	HI GROWTH CORPORATE SERVICES PVT LTD	BUY	82	39
PROTEAN	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	744	627
PROTEAN	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	744	628
PROTEAN	HRTI PRIVATE LIMITED	SELL	216	623
PROTEAN	HRTI PRIVATE LIMITED	BUY	240	623
PROTEAN	IMC INDIA SECURITIES PRIVATE LIMITED	BUY	203	629
PROTEAN	IMC INDIA SECURITIES PRIVATE LIMITED	SELL	226	625
PROTEAN	IRAGE BROKING SERVICES LLP	SELL	191	627
PROTEAN	IRAGE BROKING SERVICES LLP	BUY	231	625
PROTEAN	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	332	627
PROTEAN	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	378	626
PROTEAN	MICROCURVES TRADING PRIVATE LIMITED	SELL	773	631
PROTEAN	MICROCURVES TRADING PRIVATE LIMITED	BUY	773	631
PROTEAN	QE SECURITIES LLP	BUY	720	627
PROTEAN	QE SECURITIES LLP	SELL	723	626
QUALIANCE	NEO APEX SHARE BROKING SERVICES LLP	SELL	225	174
QUALIANCE	VIJIT GLOBAL SECURITIES PRIVATE LIMITED	BUY	369	174
RACE	NIDHI AGARWAL	SELL	99	105
RACE	OM PRAKASH MANTRI	BUY	200	105
RACE	ROHAN AGARWAL	SELL	282	105
RACE	SURENDRA KUMAR MAHESHWARI	BUY	178	105

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
RAMRAT	TRADE SOLVENT PRIVATE LIMITED	BUY	549	563
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	SELL	922	334
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	BUY	1055	334
RAYMOND	HRTI PRIVATE LIMITED	BUY	401	1144
RAYMOND	HRTI PRIVATE LIMITED	SELL	429	1148
RHIM	BANDHAN MUTUAL FUND	BUY	2778	360
RHIM	DALMIA BHARAT REFRACTORIES LIMITED	SELL	22941	360
RHIM	NIPPON INDIA MUTUAL FUND	BUY	2497	360
RHIM	SBI MUTUAL FUND	BUY	16667	360
SHIVAUM	ARC FINANCE LIMITED	SELL	93	460
SHIVAUM	ARIHANT CAPITAL MARKETS LIMITED	SELL	2	519
SHIVAUM	ARIHANT CAPITAL MARKETS LIMITED	BUY	74	494
SHIVAUM	ARYAMAN CAPITAL MARKETS LIMITED	SELL	200	460
SHIVAUM	CRABEL VINTRADE PRIVATE LIMITED	BUY	100	460
SHIVAUM	EMRALD COMMERCIAL LIMITED	SELL	76	460
SHIVAUM	SHREE SHYAM SNACKS FOOD PRIVATE LIMITED	BUY	100	460
SHIVAUM	TRADE CORNER	BUY	175	460
SHIVAUM	VENKATESHWARA INDUSTRIAL PROMOTION CO LIMITED	SELL	131	460
SKYWAYS	HRTI PRIVATE LIMITED	BUY	892	128
SKYWAYS	HRTI PRIVATE LIMITED	SELL	1049	128
SKYWAYS	QE SECURITIES LLP	BUY	1104	129
SKYWAYS	QE SECURITIES LLP	SELL	1162	129
STRIDERS	ANISH RAMJI SHAH	SELL	117	61
STYLEBAAZA	SHRUTI MOHTA	SELL	670	376
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	BUY	104	437
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	SELL	307	431
SUNSHINE	VIKHRAM SHANKAR SAXENA	BUY	240	430
SUVIDHAA	PRASHANT PRAHALADRAY THAKAR	SELL	1275	2
TRANSRAILL	MICROCURVES TRADING PRIVATE LIMITED	BUY	1011	473
TRANSRAILL	MICROCURVES TRADING PRIVATE LIMITED	SELL	1011	473
TRANSRAILL	QE SECURITIES LLP	BUY	729	468
TRANSRAILL	QE SECURITIES LLP	SELL	756	466
UNIECOM	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	729	88
UNIECOM	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	729	88
VCL	GOLDEN BIO ENERGY LIMITED	SELL	1410	2
VCL	RAJVANSH ELECTRICALS PRIVATE LIMITED	SELL	2084	2
VEEGALAND	CHITTILAPPILLY THOMAS KOCHUOUSEPH	BUY	269	138

Block Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
RHIM	BANDHAN MUTUAL FUND	BUY	2,778	360
RHIM	CLARUS CAPITAL 1	BUY	1,000	360
RHIM	DALMIA BHARAT REFRACTORIES LIMITED	SELL	22,941	360
RHIM	NIPPON INDIA MUTUAL FUND	BUY	2,497	360
RHIM	SBI MUTUAL FUND	BUY	16,667	360

Global Macro Events

Event	Previous	Forecast
USA		
API Crude Oil Stock Change SEP/18	7.14M	
MBA 30-Year Mortgage Rate SEP/18	6.97%	
MBA Mortgage Applications SEP/18	-4.10%	
MBA Mortgage Market Index SEP/18	230.8	
MBA Mortgage Refinance Index SEP/18	627.1	
MBA Purchase Index SEP/18	156.2	
S&P Global Composite PMI Flash SEP	56.0	55.2
S&P Global Manufacturing PMI Flash SEP	53.9	53.0
S&P Global Services PMI Flash SEP	56.5	56.4
Fed Barr Speech		
EIA Crude Oil Stocks Change SEP/18	-0.64M	
EIA Gasoline Stocks Change SEP/18	0.794M	
EIA Crude Oil Imports Change SEP/18	-1.18M	
EIA Cushing Crude Oil Stocks Change SEP/18	-0.342M	
EIA Distillate Fuel Production Change SEP/18	-0.121M	
EIA Distillate Stocks Change SEP/18	1.585M	
EIA Gasoline Production Change SEP/18	0.336M	
EIA Heating Oil Stocks Change SEP/18	0.684M	
EIA Refinery Crude Runs Change SEP/18	-0.256M	
17-Week Bill Auction	0.04	
Fed Barr Speech		
EIA Crude Oil Stocks Change SEP/18	-0.64M	
EIA Gasoline Stocks Change SEP/18	0.794M	
EIA Crude Oil Imports Change SEP/18	-1.18M	
EIA Cushing Crude Oil Stocks Change SEP/18	-0.342M	
EIA Distillate Fuel Production Change SEP/18	-0.121M	
EIA Distillate Stocks Change SEP/18	1.585M	
EIA Gasoline Production Change SEP/18	0.336M	
EIA Heating Oil Stocks Change SEP/18	0.684M	
EIA Refinery Crude Runs Change SEP/18	-0.256M	
17-Week Bill Auction	4.03%	
2-Year FRN Auction	0.06%	
5-Year Note Auction	4.39%	
UN General Assembly		
Germany		
S&P Global Manufacturing PMI Flash SEP	54.3	54.0
S&P Global Composite PMI Flash SEP	51.8	51.7
S&P Global Services PMI Flash SEP	49.7	50.1
15-Year Bund Auction	3.50%	
20-Year Bund Auction	3.88%	
30-Year Bund Auction	3.90%	
India	54.3	54.5
S&P Global Manufacturing PMI Flash SEP	52.8	53.2
S&P Global Composite PMI Flash SEP	54.1	54.7
S&P Global Services PMI Flash SEP		

Global Macro Events

Event	Previous	Forecast
Great Britain		
S&P Global Manufacturing PMI Flash SEP	51.7	51.5
S&P Global Services PMI Flash SEP	52.5	52.3
S&P Global Composite PMI Flash SEP	52.5	52.3

ventura — Daily Updates

Nifty & Bank Spot – Pivot Levels 23/09/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	23329.00	23246	23163	23042	23450	23571	23654
Bank Nifty	56215.55	55990	55765	55425	56555	56895	57120

Goodluck India Ltd – Technical Stock Call – 23/09/2026

Technical Stock Call	Action	CMP	Target	Support	SL
GOODLUCK	BUY	538.05	680	(523-510)-(492-478)	465

Sector: Capital Goods (INE127I01024)

About: **Goodluck India Ltd.** is a diversified engineering and precision steel products company engaged in manufacturing engineering structures, forgings, precision tubes, auto tubes, CR coils, and steel pipes. Established in 1986 and headquartered in Ghazia bad, Uttar Pradesh, the company exports to 100+ countries and serves industries such as defence, railways, infrastructure, automotive, oil & gas, and renewable energy.

View – Medium Term Bullish

The stock commenced its downtrend from 531.67 (AUG 26).

Forming Down Gaps, the stock started trading below the averages & gradually reached a low of 417.33 (AUG 26), taking support on 200 SMA.

The stock attracted buying interest at lower levels & commenced its up move reaching a high of 494.40 (AUG 26), but faced res istance & witnessed a minor correction reaching a low of 430.10 (AUG 26).

Again, buying interest emerged at lower levels leading to a gradual recovery, rallied upwards marking a high of 539 (SEP 26) & recently, after forming higher bottoms, the stock has given a **Ascending Triangle Breakout** on the daily chart supported by volumes with a bullish candle reaching to a high of 540.95 (SEP 26), which is higher than the previous swing highs.

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

Target of **680** is expected with lower support levels at **(523-510)-(492-478)** in case of intermediate fall.

A stop loss at **465** is to be followed for the trade.
All the calls/opinions are subject to Disclosures and Disclaimer http://goo.gl/8bCMyQ

Arihant Capital Markets Ltd – Technical Stock Call – 23/09/2026

Technical Stock Call	Action	CMP	Target	Support	SL
ARIHANTCAP	BUY	90.99	125	(86-81-77)	72.60

Sector: Financial Services (INE420B01036)

About: **Arihant Capital Markets Ltd.** is a diversified financial services company providing stock broking, wealth management, merchant banking, portfolio management (PMS), depository services, and investment advisory. Established in 1992, the company serves re tail, HNI, institutional, and corporate clients through a nationwide network of branches and digital trading platforms.

View – Medium Term Bullish

The stock commenced its downtrend from 87.75 (FEB 26).

Stock started trading below the averages breaching 200 SMA & further extended its decline reaching a low of 56.97 (MAR 26).

The stock attracted buying interest at lower levels & commenced its up move reaching a high of 84.80 (JUL 26), but faced resi stance & witnessed a minor correction taking support on 200 SMA.

Again, buying interest emerged at lower levels leading to a gradual recovery & recently, after forming higher bottoms, the st ock has given a **Ascending Triangle Breakout** on the weekly chart supported by volumes with a bullish candle reaching to a high of 93 (SEP 26), which is higher than the previous swing highs.

Indicators like MACD, Aroon, KST & RSI suggests positive crossover.

The stock is trading above 200 SMA.

Target of **125** is expected with lower support levels at **(86-81-77)** in case of intermediate fall.

A stop loss at **72.60** is to be followed for the trade.

Stock specific news

Bharat Forge: ₹2,500 Crore QIP Completed
Completed the qualified institutional placement process and allotted 1,05,82,010 equity shares.The QIP was approved through the board process and closed on 22 September.The fund raise increases institutional ownership participation and strengthens capital availability.

Pace Digitek: ₹488 Crore BESS Order
Subsidiary Lineage Power Private Limited received a ₹488.46 crore order from NTPC GE Power Services.The order relates to development of a Battery Energy Storage System (BESS) at NTPC's Barh Super Thermal Power Project.The project covers NTPC Barh Stage I and Stage II requirements.

IRB Infrastructure: Trust Term Sheet Update
Received an update regarding a binding term sheet with IRB Infrastructure Trust.The transaction relates to restructuring/transfer of identified infrastructure assets.The company disclosed the development under Regulation 30; detailed financial impact requires final transaction documentation.

Arvind SmartSpaces: New Project Launch
Announced a new real-estate development through a press release dated 22 September.The project expands the company's residential development pipeline.The announcement was made under Regulation 30; detailed project economics were not available in the filing summary.

Lemon Tree Hotels: Scheme Approval Update
Received observation letters with no objection from stock exchanges regarding its proposed scheme of arrangement.The process relates to regulatory progression of the restructuring proposal.The scheme remains subject to further statutory and shareholder approvals.

Adani Green Energy: Regulatory Update
Reported an action/update related to a regulatory matter under Regulation 30.The company disclosed the development to exchanges on 22 September.The filing summary does not provide additional financial impact details.

Prostarm Info Systems: Solar Order Win
Received a purchase order from Rayzon Energy Private Limited.The order relates to supply/services for the solar-energy segment.The filing confirms receipt of the order but detailed contract value was not available in the summary.

Silver Touch Technologies: Order Received
Secured a new order under the company's order-receipt disclosure category.The announcement was filed on 22 September under Regulation 30.Customer name, order value and execution timeline require detailed filing review.

Dhanuka Agritech: New Product Launch
Launched a new agricultural-input product during September 2026.The announcement relates to expansion of its product portfolio.The filing summary does not disclose expected revenue contribution or market size.

Western Carriers: Shareholding Disclosure
Submitted disclosure under SEBI shareholding regulations.The announcement relates to ownership-related reporting requirements.No operational change was disclosed in the filing summary.

Coromandel International: Regulatory Update
Disclosed an action taken/order-related update under Regulation 30.The announcement relates to a regulatory development involving the company.The available summary does not quantify financial impact.

Indian Metals: Legal Order Update
Reported an action initiated or order passed relating to the company.The disclosure was made under exchange regulations on 22 September.Further details require review of the attached legal order document.

Sasken Technologies: Legal Proceedings Update
Disclosed action initiated/orders passed relating to the company.The announcement was filed under regulatory disclosure requirements.The available summary does not provide any monetary impact.

Adani Enterprises: Regulatory Action Update
Reported an action taken/order passed disclosure.The company informed exchanges regarding the development under Regulation 30.The filing summary does not provide quantified financial implications.

UltraTech Cement: Rumour Verification
Provided a response under Regulation 30(11) rumour verification requirements.The company addressed market speculation through exchange disclosure.The filing does not indicate any confirmed transaction based on the available summary.

Embassy Developments: ₹105 Crore NCD Issue
Allotted non-convertible debentures aggregating ₹105 crore.The issuance was disclosed on 22 September.The fund raise supports debt-market financing through listed securities.

GIC Housing Finance: Securities Issue
Announced issuance of securities on 22 September.The disclosure relates to a capital-market transaction.The filing summary does not provide issue size or pricing details.

Manba Finance: Securities Issue
Announced issue of securities under exchange disclosure requirements.The company informed exchanges regarding the transaction.Detailed issue size and terms require filing document review.

Rama Steel Tubes: Preferential Issue
Announced issue of securities through a preferential issue route.The company also disclosed amendment in an existing share purchase agreement.The transaction requires assessment of final ownership and capital impact.

3i Infotech: Share Allotment
Allotted 98,237 equity shares of the company.The allotment was disclosed on 22 September.The filing relates to equity capital change rather than operating business expansion.

Axis Bank: ESOP Share Allotment
Allotted 79,227 shares under employee stock option scheme.The transaction results in marginal equity dilution.The disclosure relates to employee compensation structure.

ICICI Lombard: ESOP Share Allotment
Allotted 6,521 shares under employee stock option scheme.The allotment increases outstanding equity marginally.The announcement relates to employee benefit implementation.

AU Small Finance Bank: ESOP Allotment
Allotted 3,78,830 equity shares under ESOP scheme.The transaction represents employee-linked equity issuance.The impact on total share capital is limited.

TVS Motor: Postal Ballot Notice
Issued notice for shareholder approval through postal ballot.The proposal requires shareholder voting before implementation.The filing relates to corporate action approval process.

Kirloskar Oil Engines: Postal Ballot Result
Submitted scrutiniser report for postal ballot voting.The company disclosed shareholder voting outcome to exchanges.The announcement confirms completion of the voting process.

Industrial Investment Trust: No Objection Received
Disclosed receipt of no-objection related communication.The update was submitted under exchange disclosure requirements.The filing summary does not provide transaction value.

EFC India: NCLT Scheme Order
Informed exchanges regarding the NCLT order related to scheme of arrangement/demerger.The order represents regulatory progress for restructuring.Implementation remains subject to completion of required steps.

Nesco: Regulatory Order Update
Reported an action taken/order passed disclosure.The announcement was filed under exchange regulations.The available summary does not provide monetary impact.

Man Infraconstruction: Postal Ballot Result
Submitted scrutiniser report for postal ballot proceedings.The disclosure confirms shareholder voting completion.No operational or financial impact was disclosed.

C.E. Info Systems: Volume Movement Update
NSE sought clarification after observing significant movement in trading volume.The company submitted its response to the exchange.The filing does not indicate any undisclosed material event.

Macro / Non-Stock News

IT Stocks Drag Markets Lower
Indian equities reversed early gains on 22 September, with Nifty falling 85.30 points (-0.36%) to 23,329 and Sensex declining 329.91 points (-0.44%) to 74,529. IT stocks led the decline as investors remained cautious on global technology demand and earnings outlook. 14 of 16 major sectors ended lower, indicating broad-based selling pressure. (Reuters)

FII Selling Accelerates Again
Foreign investors turned aggressive sellers on 22 September, selling equities worth ₹3,810 crore, while DIIs absorbed the pressure with purchases of ₹4,120 crore. September FII outflows widened to ₹11,427 crore, highlighting continued foreign positioning concerns amid elevated US yields and global uncertainty. (Moneycontrol)

Nifty Holds 23,300 Support
Nifty closed near the key 23,300 support zone after failing to sustain intraday gains. Derivatives positioning remained centred around the 23,300–23,500 range, with traders monitoring expiry-related volatility and foreign selling pressure for the next move. (Reuters)

Crude Slides Below $100
Brent crude declined below $100/bbl, falling to around $99–100/bbl, after reports indicated potential improvement in Middle-East supply conditions and possible US-Iran diplomatic discussions. Lower crude prices provide relief to India's current account, inflation outlook and INR stability. (Reuters)

US-Iran Talks In Focus
Markets monitored developments around potential US-Iran discussions during the UN General Assembly. Any reduction in geopolitical tensions could lower the risk premium in crude oil, while renewed escalation remains a key trigger for energy prices and global risk sentiment. (Reuters)

RBI Liquidity Tightens
RBI liquidity management continued to absorb excess banking liquidity through OMO sales and other operations. System liquidity surplus declined towards around ₹6 trillion from earlier highs above ₹11 trillion, while the weighted average call rate moved closer to the repo rate of 5.25%, indicating tighter money-market conditions. (The Financial Express)

Bond Yield Remains Stable
India's benchmark 10-year government bond yield remained around 7.05%, supported by easing crude prices but balanced by RBI liquidity absorption and global yield pressures. Investors continue tracking US Treasury yields and RBI actions for direction. (Moneycontrol)

Nasdaq Hits Record High
US equities remained resilient, with the Nasdaq Composite closing at a record high (+0.45%), supported by AI-related stocks and improving technology sentiment. S&P 500 was largely flat, while Dow declined 0.36%. Positive technology cues may partially support Indian IT sentiment despite domestic IT weakness. (MarketScreener)

US 10Y Yield Eases
US Treasury yields declined as oil prices softened, with the 10-year yield falling towards 4.93%. Lower yields provided some relief to global equity valuations, although markets remain cautious ahead of further Fed policy signals. (MarketWatch)

China Trade Talks Drive Sentiment
Markets remained focused on upcoming US-China discussions covering tariffs, AI and critical minerals. Expectations of maintaining trade stability supported Asian equities, while any tariff escalation remains a risk for global manufacturing and commodity-linked sectors. (Reuters)

Disclosures and Disclaimer

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