

## Market Commentary

### Overnight global action:

On 2nd October 2026, US markets ended higher, with the S&P 500 gaining by 56.3 pts (+0.73%), Dow Jones rising by 250.4 pts (+0.49%) and Nasdaq 100 advancing by 306.4 pts (+1.00%). Gift Nifty declined by 168.5 pts (-0.74%), indicating a negative opening for Indian markets.

NSE witnessed 1,009 advances against 2,552 declines, while BSE witnessed 1,226 advances versus 3,204 declines.

### Index Options Data Analysis:

Sensex OI peaks at 71,900 Calls and 72,000 Puts. PCR stands at 0.833. NIFTY OI peaks at 22,000 Calls and 22,700 Puts. PCR stands at 0.770. BANKNIFTY OI peaks at 55,000 Calls and 55,000 Puts. PCR stands at 1.285.

### Securities in Ban for F&O Trade:

AMBUJACEM, SAIL, BANDHANBANK

### Sector Performance:

NIFTY AUTO index declined by 3.46 % dragged by BAJAJ-AUTO(-7.62%), UNOMINDA(-5.04%)

NIFTY IT index rose by 2.17 % driven by MPHASIS(+4.45%), COFORGE(+4.40%)

NIFTY PVT BANK index rose by 0.01 % driven by RBLBANK(+2.00%), HDFCBANK(+1.76%)

NIFTY METAL index declined by 2.35 % dragged by LLOYDSME(-5.52%), SAIL(-3.85%)

NIFTY OIL AND GAS index declined by 1.32 % dragged by CHENNPETRO(-6.64%), IOC(-2.66%)

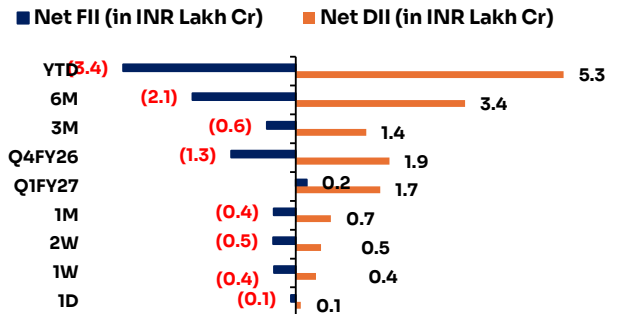
NIFTY CEMENT index declined by 2.30 % dragged by NUVoco(-4.80%), GRASIM(-3.26%)

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| Fund Flow - 1st Oct 2026 | Buy      | Sell     | Net      |
|--------------------------|----------|----------|----------|
| FII/FPI (INR Cr)         | 12,260.3 | 21,744.5 | -9,484.2 |
| DII (INR Cr)             | 25,420.0 | 15,378.2 | 10,041.8 |



| Indian Indices  | CMP    | 1D     | YTD     | P/E x |
|-----------------|--------|--------|---------|-------|
| Gift Nifty      | 22,491 | -0.74% | -14.40% | 20.4  |
| Sensex 30       | 71,910 | -0.79% | -15.62% | 18.8  |
| Nifty 50        | 22,422 | -0.88% | -14.19% | 20.3  |
| India VIX       | 14     | 7.15%  | 52.56%  |       |
| Nifty Bank      | 54,451 | -0.33% | -8.61%  | 16.0  |
| Nifty Next 50   | 68,981 | -1.10% | -0.55%  | 69.0  |
| Nifty 500       | 21,858 | -0.97% | -8.44%  | 20.5  |
| Nifty Mid 100   | 58,732 | -1.01% | -2.90%  | 30.2  |
| Nifty Small 250 | 17,589 | -1.18% | 5.42%   | 29.6  |
| USD/INR         | 96.3   | -0.01% | 7.07%   |       |
| India 10Y       | 7.2%   |        |         |       |
| India 2Y        | 6.6%   |        |         |       |
| India 1Y        | 6.5%   |        |         |       |
| Bank Rate       | 5.8%   |        |         |       |

| Global Indices | CMP    | 1D     | YTD    | P/E x |
|----------------|--------|--------|--------|-------|
| S&P 500        | 7,723  | 0.73%  | 12.81% | 33.4  |
| Dow Jones      | 51,177 | 0.49%  | 6.48%  | 24.7  |
| Nasdaq 100     | 30,808 | 1.00%  | 22.01% | 50.6  |
| FTSE 100       | 10,462 | 0.32%  | 5.34%  | 16.5  |
| CAC 40         | 7,897  | 0.79%  | -3.10% | 23.2  |
| DAX            | 25,231 | 1.17%  | 3.02%  | 26.3  |
| Nikkei 225     | 68,309 | -0.94% | 35.70% | 36.5  |
| Hang Seng      | 23,972 | -2.60% | -6.47% | 11.6  |
| Shanghai Comp  | 3,842  | 0.31%  | -3.19% | 17.4  |
| KOSPI          | 7,004  | 0.46%  | 66.20% | 34.7  |
| S&P/ASX 200    | 8,708  | 0.30%  | 0.00%  | 23.0  |

## Stocks in the News

### **HDFC BANK (CMP: 721, MARKET CAP: 1111989 Cr., SECTOR: BANKING)**

#### [NSE filing](#)

Gross advances reached ₹32.20 lakh crore, up 16.3% YoY, at September-end. Deposits increased 18.8% to ₹33.28 lakh crore, with time deposits growing 22.8% and CASA deposits growing 10.8%. The bank mobilised US\$11.5 billion of foreign-currency deposits under the RBI's FCNR(B) swap facility; overseas branches extended US\$5.7 billion in loans against these deposits.

### **BAJAJ FINANCE (CMP: 948, MARKET CAP: 590407 Cr., SECTOR: NBFC / LENDING)**

#### [NSE filing](#)

September-end assets under management increased 26.5% YoY to approximately ₹5,84,750 crore, adding about ₹37,800 crore during the quarter. New loans booked rose 11% to 13.45 million, compared with 12.17 million a year earlier. The customer base reached 128.85 million, including 4.42 million customers added during Q2. Deposits stood at approximately ₹69,750 crore.

### **TATA MOTORS PASSENGER VEHICLES (CMP: 279, MARKET CAP: 102903 Cr., SECTOR: AUTOMOBILES)**

#### [NSE filing](#)

JLR's Q2 FY27 wholesale volumes increased 24.5% YoY to 82,400 vehicles, against 66,165 a year earlier. Retail sales, including the China joint venture, declined 7.5% to 79,000 vehicles from 85,371. China-region wholesales fell to 6,100 from 11,370, while UK wholesales increased to 21,000 from 12,327. The wholesale growth comparison benefited from last year's cyber disruption, which had reduced the corresponding quarter's volumes.

### **DLF (CMP: 658, MARKET CAP: 162975 Cr., SECTOR: REAL ESTATE)**

#### [NSE filing](#)

DLF sold all 172 residences at The Aureva, recording approximately ₹1,985 crore in sales bookings. The luxury retirement-housing project is located in Sector 63, Gurugram, adjoining The Arbour. It occupies 4.17 acres, with more than 7.5 lakh sq ft of saleable area, and comprises a G+45 tower offering four-bedroom residences.

| Sectoral Index  | CMP    | 1D     | YTD     | P/E x |
|-----------------|--------|--------|---------|-------|
| Nifty Auto      | 25,385 | -3.46% | -9.95%  | 20.9  |
| Nifty IT        | 28,305 | 2.17%  | -25.29% | 22.1  |
| Nifty Fin Ser   | 24,556 | -0.38% | -11.07% | 16.0  |
| Nifty Pharma    | 26,312 | -0.48% | 15.79%  | 43.3  |
| Nifty Services  | 28,958 | -0.19% | -13.96% | 31.9  |
| Nifty Cons Dur  | 35,928 | -1.91% | -2.25%  | 48.7  |
| Nifty PSE       | 9,209  | -1.62% | -6.55%  | 9.7   |
| Nifty FMCG      | 43,790 | -1.61% | -21.06% | 30.2  |
| Nifty Pvt Bank  | 26,697 | 0.01%  | -7.05%  | 10.0  |
| Nifty PSU Bank  | 7,938  | -0.98% | -6.98%  | 13.0  |
| Nifty Cons      | 10,863 | -1.89% | -11.61% | 38.4  |
| Nifty Energy    | 36,388 | -0.68% | 3.01%   | 11.5  |
| Nifty Health    | 16,096 | -0.26% | 9.94%   | 38.5  |
| Nifty India Mfg | 15,196 | -1.67% | -1.41%  | 28.3  |
| Nifty Metal     | 12,461 | -2.35% | 11.58%  | 22.3  |
| Nifty Oil & Gas | 10,475 | -1.32% | -14.36% | 16.0  |

## Derivatives Position (Combined)

| Stock                 | % Chg OI | %Chg LTP |
|-----------------------|----------|----------|
| <b>Long</b>           |          |          |
| ENRIN                 | 74.7     | 3.6      |
| INFY                  | 3.8      | 3.6      |
| SBILIFE               | 1.7      | 2.1      |
| CUMMINSIND            | 1.0      | 1.5      |
| HCLTECH               | 0.9      | 1.5      |
| <b>Short</b>          |          |          |
| LAURUSLABS            | 0.7      | -0.3     |
| PREMIERENE            | 4.8      | -0.3     |
| NESTLEIND             | 2.5      | -0.3     |
| PHOENIXLTD            | 0.2      | -0.4     |
| OFSS                  | 0.0      | -0.5     |
| <b>Long Unwinding</b> |          |          |
| TATACONSUM            | -0.7     | -0.1     |
| CAMS                  | -1.1     | -0.1     |
| APOLLOHOSP            | -2.7     | -0.2     |
| BAJAJFINSV            | -0.2     | -0.2     |
| AXISBANK              | -0.3     | -0.2     |
| <b>Short Covering</b> |          |          |
| MPHASIS               | -0.7     | 4.3      |
| COFORGE               | -3.2     | 3.6      |
| HDFCLIFE              | -0.5     | 3.5      |
| FORTIS                | -0.9     | 2.8      |
| PERSISTENT            | -1.3     | 2.6      |

**NYKAA — FSN E-COMMERCE VENTURES (CMP: 325, MARKET CAP: 93075 Cr., SECTOR: BEAUTY & FASHION RETAIL)**[NSE filing](#)

Nykaa expects Q2 FY27 consolidated net-revenue growth in the late-twenties percentage range YoY. Beauty revenue growth is also expected in the late twenties, while Fashion revenue growth is expected in the early forties. The company added 14 net new stores, bringing its network to 338 stores at September-end. Like-for-like store-sales growth reached the early-twenties percentage range, its highest level in six quarters.

| Commodities | CMP   | 1D    | YTD    |
|-------------|-------|-------|--------|
| Gold (\$)   | 4,145 | 0.10% | -4.17% |
| Silver (\$) | 60.7  | 0.49% | -16.1% |

| Currency | CMP   | 1D     | YTD    |
|----------|-------|--------|--------|
| USD/INR  | 96.3  | -0.01% | 7.07%  |
| EUR/INR  | 108.4 | 0.02%  | 2.63%  |
| GBP/INR  | 127.5 | 0.01%  | 5.34%  |
| JPY/INR  | 0.6   | 0.13%  | 6.48%  |
| EUR/USD  | 1.1   | 0.00%  | -3.58% |

| Securities Lending & Borrowing Scheme |           |          |            |
|---------------------------------------|-----------|----------|------------|
| Company                               | Under.Ltp | Fut.Ltp  | Spread (%) |
| IREDA                                 | 111.00    | 106.90   | 3.69       |
| BLUESTARCO                            | 1,459.60  | 1,408.90 | 3.47       |
| KFINTECH                              | 832.00    | 818.25   | 1.65       |
| IRFC                                  | 77.06     | 75.88    | 1.53       |
| KAYNES                                | 3,399.00  | 3,350.00 | 1.44       |

## 52 Week High

| Stock      | LTP    | New 52W high | Prev 52W high |
|------------|--------|--------------|---------------|
| AARTIPHARM | 966    | 1,002        | 909           |
| AZAD       | 2,965  | 3,128        | 2,998         |
| LLOYDSENGG | 98     | 104          | 103           |
| NAZARA     | 385    | 402          | 393           |
| DYNAMATECH | 13,607 | 13,657       | 13,420        |

## 52 Week Low

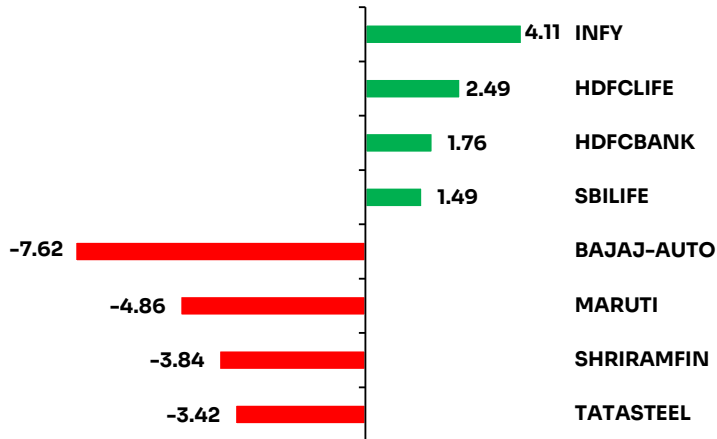
| Stock     | LTP   | New 52W low | Prev 52W low |
|-----------|-------|-------------|--------------|
| ABFRL     | 46    | 46          | 46           |
| ASTRAZEN  | 6,189 | 6,084       | 6,121        |
| AURIONPRO | 623   | 618         | 632          |
| BIKAJI    | 513   | 508         | 522          |
| BLS       | 218   | 218         | 220          |

## Volume Shockers

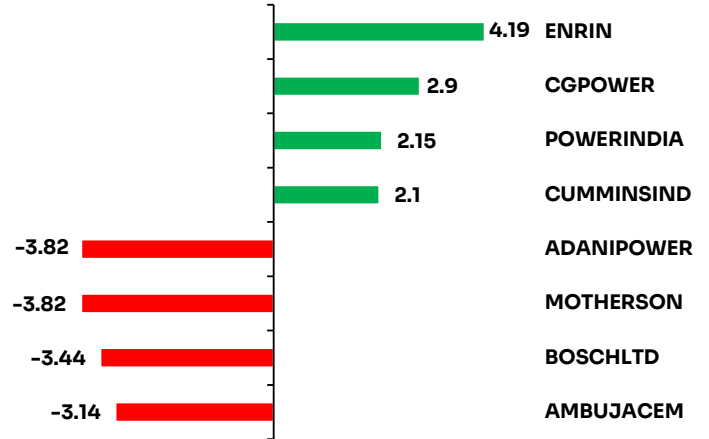
| Stock      | Vol (000) | 1W avg vol (000) | 2W avg vol (000) | LTP (INR) |
|------------|-----------|------------------|------------------|-----------|
| NIRLON     | 2,332     | 4                | 4                | 605       |
| PIXTRANS   | 1,455     | 369              | 169              | 1,775     |
| WHBRADY    | 0         | 0                | 0                | 465       |
| NEXT30ADD  | 607       | 156              | 71               | 40        |
| GKSL       | 34,935    | 9,102            | 4,615            | 195       |
| TARIL      | 57,280    | 14,950           | 7,092            | 284       |
| PACEDIGITK | 22,773    | 6,023            | 6,009            | 167       |
| MTNL       | 44,121    | 11,800           | 5,578            | 24        |
| RVTH       | 44        | 12               | 6                | 779       |
| KREBSBIO   | 611       | 168              | 77               | 66        |
| HDFCNIMEG  | 48        | 13               | 9                | 128       |
| LOKESHMACH | 992       | 282              | 147              | 398       |
| FEDDERSHOL | 61,090    | 17,543           | 22,792           | 64        |
| MOGSEC     | 1,381     | 403              | 187              | 65        |
| SMLT       | 113       | 33               | 18               | 74        |
| HILINFRA   | 1,173     | 348              | 188              | 45        |
| ASPINWALL  | 23        | 7                | 5                | 240       |
| HYBRIDFIN  | 95        | 29               | 15               | 17        |
| LEMONTREE  | 32,197    | 9,696            | 5,598            | 107       |
| CHOICEGOLD | 97        | 30               | 19               | 146       |
| SUNLOC     | 1         | 0                | 0                | 70        |
| BNAGROCHEM | 435       | 135              | 60               | 228       |
| ABSLMSCIN  | 1         | 0                | 0                | 28        |
| MMWL       | 429       | 134              | 95               | 16        |
| QUALITY30  | 46        | 15               | 10               | 20        |

## Top Gainers & Losers

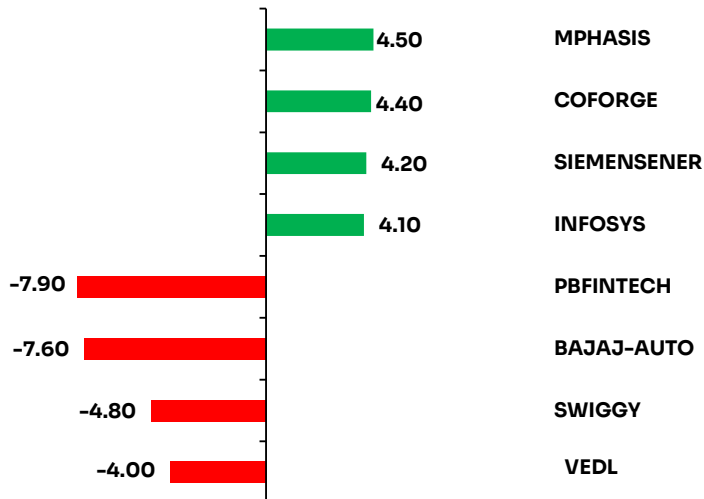
### Nifty 50



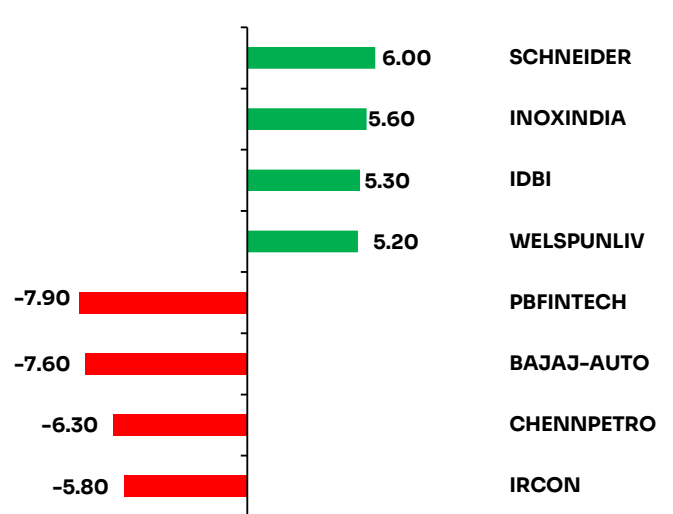
### Nifty Next 50



### Nifty 200



### Nifty 500



## Bulk Deals

| Security Name | Client Name                                  | Buy / Sell | Qty (in 000) | Price |
|---------------|----------------------------------------------|------------|--------------|-------|
| ADVANCE       | GROWVIA TRADE PRIVATE LIMITED                | BUY        | 350          | 117   |
| ADVANCE       | L7 HITECH PRIVATE LIMITED                    | SELL       | 350          | 117   |
| AGARWALTUF    | VAIBHAV RAJENDRA DOSHI                       | BUY        | 144          | 167   |
| AGARWALTUF    | VAIBHAV RAJENDRA DOSHI                       | SELL       | 164          | 167   |
| ALICON        | RAJEEV SIKAND                                | SELL       | 136          | 863   |
| AMBANIORGO    | ECHJAY FORGING INDUSTRIES PRIVATE LIMITED    | SELL       | 61           | 115   |
| AMBANIORGO    | SIDHACHAKRA ENTERPRISE LLP                   | BUY        | 61           | 115   |
| AONESTEELS    | CITADEL SECURITIES SINGAPORE PTE LIMITED     | SELL       | 655          | 438   |
| AONESTEELS    | GRT STRATEGIC VENTURES LLP                   | SELL       | 515          | 434   |
| AONESTEELS    | GRT STRATEGIC VENTURES LLP                   | BUY        | 515          | 434   |
| AONESTEELS    | IRAGE BROKING SERVICES LLP                   | BUY        | 428          | 428   |
| AONESTEELS    | IRAGE BROKING SERVICES LLP                   | SELL       | 511          | 438   |
| AONESTEELS    | MARWADI CHANDARANA INTERMEDIARIES BROKERS PI | SELL       | 570          | 426   |
| AONESTEELS    | MARWADI CHANDARANA INTERMEDIARIES BROKERS PI | BUY        | 573          | 420   |
| AONESTEELS    | NK SECURITIES RESEARCH PRIVATE LIMITED       | BUY        | 434          | 432   |
| AONESTEELS    | NK SECURITIES RESEARCH PRIVATE LIMITED       | SELL       | 434          | 432   |
| AONESTEELS    | URMILA MAHESHWARI                            | BUY        | 470          | 427   |
| AONESTEELS    | URMILA MAHESHWARI                            | SELL       | 471          | 451   |
| ARMEE         | AFFLUENCE FINCON SERVICE PRIVATE LIMITED     | BUY        | 350          | 273   |
| ARMEE         | ALPHAGREP SECURITIES PRIVATE LIMITED         | BUY        | 262          | 275   |
| ARMEE         | ALPHAGREP SECURITIES PRIVATE LIMITED         | SELL       | 262          | 275   |
| ARMEE         | COMFORT CAPITAL PRIVATE LIMITED              | BUY        | 218          | 279   |
| ARMEE         | COMFORT CAPITAL PRIVATE LIMITED              | SELL       | 218          | 279   |
| ARMEE         | GRT STRATEGIC VENTURES LLP                   | SELL       | 190          | 275   |
| ARMEE         | GRT STRATEGIC VENTURES LLP                   | BUY        | 190          | 275   |
| ARMEE         | JUNOMONETA FINSOL PRIVATE LIMITED            | SELL       | 214          | 275   |
| ARMEE         | JUNOMONETA FINSOL PRIVATE LIMITED            | BUY        | 217          | 276   |
| ARMEE         | MATHISYS QUANTCAP LLP                        | SELL       | 324          | 276   |
| ARMEE         | MATHISYS QUANTCAP LLP                        | BUY        | 324          | 275   |
| ARMEE         | MICROCURVES TRADING PRIVATE LIMITED          | BUY        | 289          | 274   |
| ARMEE         | MICROCURVES TRADING PRIVATE LIMITED          | SELL       | 289          | 274   |
| ARMEE         | NK SECURITIES RESEARCH PRIVATE LIMITED       | BUY        | 321          | 275   |
| ARMEE         | NK SECURITIES RESEARCH PRIVATE LIMITED       | SELL       | 323          | 275   |
| ARMEE         | PAWAN KUMAR MITTAL                           | SELL       | 476          | 279   |
| ARMEE         | PAWAN KUMAR MITTAL                           | BUY        | 476          | 277   |
| CKKRETAIL     | MANDAKINIBEN PRADYUMANBHAI PATEL             | BUY        | 85           | 169   |
| CKKRETAIL     | MANDAKINIBEN PRADYUMANBHAI PATEL             | SELL       | 158          | 170   |
| CKKRETAIL     | PRACHI VASANTKUMAR SHAH                      | BUY        | 100          | 171   |
| DELTACORP     | HRTI PRIVATE LIMITED                         | SELL       | 2118         | 78    |
| DELTACORP     | HRTI PRIVATE LIMITED                         | BUY        | 2378         | 77    |
| DELTACORP     | QE SECURITIES LLP                            | BUY        | 1752         | 77    |
| DELTACORP     | QE SECURITIES LLP                            | SELL       | 1757         | 78    |
| DHTL          | RAMESH JAIN HUF                              | BUY        | 40           | 25    |
| DHTL          | RAMESH KUMAR JAIN                            | SELL       | 44           | 25    |
| EDELWEISS     | PABRAI WAGONS ETF                            | BUY        | 14572        | 143   |
| EDELWEISS     | PABRAI WAGONS FUND                           | SELL       | 14572        | 143   |
| ELEVATE       | MORGAN STANLEY ASIA SINGAPORE PTE            | BUY        | 999          | 340   |
| FASCINATE     | SARATH CHEMBANEZHATH RAJEEVAN                | SELL       | 77           | 74    |
| FEDDERSHOL    | ALPHAGREP SECURITIES PRIVATE LIMITED         | SELL       | 1324         | 66    |
| FEDDERSHOL    | ALPHAGREP SECURITIES PRIVATE LIMITED         | BUY        | 1324         | 66    |

## Bulk Deals

| Security Name | Client Name                                  | Buy / Sell | Qty (in 000) | Price |
|---------------|----------------------------------------------|------------|--------------|-------|
| FEDDERSHOL    | ALPHAGREP SECURITIES PRIVATE LIMITED         | BUY        | 1324         | 66    |
| FEDDERSHOL    | HRTI PRIVATE LIMITED                         | SELL       | 3471         | 65    |
| FEDDERSHOL    | HRTI PRIVATE LIMITED                         | BUY        | 3472         | 65    |
| FEDDERSHOL    | JUNOMONETA FINSOL PRIVATE LIMITED            | BUY        | 2170         | 65    |
| FEDDERSHOL    | JUNOMONETA FINSOL PRIVATE LIMITED            | SELL       | 2173         | 65    |
| FEDDERSHOL    | MICROCURVES TRADING PRIVATE LIMITED          | SELL       | 3155         | 66    |
| FEDDERSHOL    | MICROCURVES TRADING PRIVATE LIMITED          | BUY        | 3155         | 66    |
| FEDDERSHOL    | NK SECURITIES RESEARCH PRIVATE LIMITED       | BUY        | 2591         | 65    |
| FEDDERSHOL    | NK SECURITIES RESEARCH PRIVATE LIMITED       | SELL       | 2591         | 65    |
| FEDDERSHOL    | PLUTUS WEALTH MANAGEMENT LLP                 | SELL       | 1366         | 65    |
| FEDDERSHOL    | PLUTUS WEALTH MANAGEMENT LLP                 | BUY        | 1366         | 65    |
| FEDDERSHOL    | QE SECURITIES LLP                            | SELL       | 1782         | 65    |
| FEDDERSHOL    | QE SECURITIES LLP                            | BUY        | 1815         | 65    |
| GKSL          | ALPHAGREP SECURITIES PRIVATE LIMITED         | BUY        | 613          | 198   |
| GKSL          | ALPHAGREP SECURITIES PRIVATE LIMITED         | SELL       | 613          | 199   |
| GKSL          | GRT STRATEGIC VENTURES LLP                   | SELL       | 570          | 199   |
| GKSL          | GRT STRATEGIC VENTURES LLP                   | BUY        | 570          | 199   |
| GKSL          | HRTI PRIVATE LIMITED                         | BUY        | 550          | 197   |
| GKSL          | HRTI PRIVATE LIMITED                         | SELL       | 564          | 197   |
| GKSL          | IMC INDIA SECURITIES PRIVATE LIMITED         | BUY        | 442          | 199   |
| GKSL          | IMC INDIA SECURITIES PRIVATE LIMITED         | SELL       | 445          | 201   |
| GKSL          | IRAGE BROKING SERVICES LLP                   | SELL       | 421          | 200   |
| GKSL          | IRAGE BROKING SERVICES LLP                   | BUY        | 466          | 200   |
| GKSL          | J4S FINANCIAL SOLUTIONS LLP                  | SELL       | 858          | 198   |
| GKSL          | J4S FINANCIAL SOLUTIONS LLP                  | BUY        | 858          | 198   |
| GKSL          | JUNOMONETA FINSOL PRIVATE LIMITED            | SELL       | 1502         | 199   |
| GKSL          | JUNOMONETA FINSOL PRIVATE LIMITED            | BUY        | 1503         | 199   |
| GKSL          | MICROCURVES TRADING PRIVATE LIMITED          | BUY        | 1499         | 200   |
| GKSL          | MICROCURVES TRADING PRIVATE LIMITED          | SELL       | 1499         | 200   |
| GKSL          | NATVARSIH T CHAVDA                           | BUY        | 302          | 194   |
| GKSL          | NATVARSIH T CHAVDA                           | SELL       | 423          | 200   |
| GKSL          | NK SECURITIES RESEARCH PRIVATE LIMITED       | SELL       | 1031         | 200   |
| GKSL          | NK SECURITIES RESEARCH PRIVATE LIMITED       | BUY        | 1031         | 200   |
| GKSL          | PRIYAL BOHRA                                 | SELL       | 400          | 193   |
| GKSL          | PRIYAL BOHRA                                 | BUY        | 400          | 196   |
| GKSL          | QE SECURITIES LLP                            | SELL       | 933          | 198   |
| GKSL          | QE SECURITIES LLP                            | BUY        | 943          | 197   |
| GKSL          | STACKIN PRIVATE LIMITED                      | SELL       | 556          | 198   |
| GKSL          | STACKIN PRIVATE LIMITED                      | BUY        | 556          | 198   |
| GKSL          | VINSUL MAKARDI LTD                           | SELL       | 816          | 199   |
| GKSL          | VINSUL MAKARDI LTD                           | BUY        | 816          | 198   |
| GLOBAL        | ALPA WEALTH CREATOR                          | SELL       | 371          | 133   |
| GLOBAL        | PRASOON PANKAJ                               | BUY        | 396          | 133   |
| GSMFOILS      | HI GROWTH CORPORATE SERVICES PVT LTD         | SELL       | 50           | 75    |
| GSMFOILS      | HI GROWTH CORPORATE SERVICES PVT LTD         | BUY        | 71           | 75    |
| HEROMOTORS    | JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED | SELL       | 2519         | 164   |
| HEROMOTORS    | JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED | BUY        | 3339         | 165   |
| HEROMOTORS    | PLUTUS WEALTH MANAGEMENT LLP                 | BUY        | 3247         | 164   |
| HEROMOTORS    | PLUTUS WEALTH MANAGEMENT LLP                 | SELL       | 3256         | 164   |

## Bulk Deals

| Security Name | Client Name                                       | Buy / Sell | Qty (in 000) | Price |
|---------------|---------------------------------------------------|------------|--------------|-------|
| IEML          | MANOJ AGARWAL HUF                                 | SELL       | 183          | 56    |
| IEML          | YASH DASHARATH GOTARANE                           | BUY        | 266          | 56    |
| JHS           | BHIM SAIN BASSI                                   | SELL       | 505          | 13    |
| KREBSBIO      | VAIBHAV UPADHYAY                                  | BUY        | 1            | 67    |
| KREBSBIO      | VAIBHAV UPADHYAY                                  | SELL       | 120          | 67    |
| MONEYVIEW     | BLITZQUANT RESEARCH LLP                           | SELL       | 13638        | 57    |
| MONEYVIEW     | BLITZQUANT RESEARCH LLP                           | BUY        | 13638        | 57    |
| MONEYVIEW     | GRT STRATEGIC VENTURES LLP                        | BUY        | 28677        | 57    |
| MONEYVIEW     | GRT STRATEGIC VENTURES LLP                        | SELL       | 28677        | 57    |
| MONEYVIEW     | IRAGE BROKING SERVICES LLP                        | BUY        | 25722        | 56    |
| MONEYVIEW     | IRAGE BROKING SERVICES LLP                        | SELL       | 29870        | 56    |
| MONEYVIEW     | MICROCURVES TRADING PRIVATE LIMITED               | SELL       | 12610        | 56    |
| MONEYVIEW     | MICROCURVES TRADING PRIVATE LIMITED               | BUY        | 12610        | 56    |
| MONEYVIEW     | NK SECURITIES RESEARCH PRIVATE LIMITED            | SELL       | 13641        | 57    |
| MONEYVIEW     | NK SECURITIES RESEARCH PRIVATE LIMITED            | BUY        | 13641        | 57    |
| MONEYVIEW     | PURE BROKING PRIVATE LIMITED                      | SELL       | 14457        | 57    |
| MONEYVIEW     | PURE BROKING PRIVATE LIMITED                      | BUY        | 14621        | 57    |
| MONEYVIEW     | TWO ROADS TRADING PRIVATE LIMITED                 | SELL       | 9921         | 57    |
| MONEYVIEW     | TWO ROADS TRADING PRIVATE LIMITED                 | BUY        | 9921         | 57    |
| MTNL          | NK SECURITIES RESEARCH PRIVATE LIMITED            | BUY        | 1881         | 25    |
| MTNL          | NK SECURITIES RESEARCH PRIVATE LIMITED            | SELL       | 1881         | 25    |
| MTNL          | SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED       | SELL       | 1725         | 25    |
| MTNL          | SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED       | BUY        | 1725         | 25    |
| NIRLON        | INRE FUND II                                      | BUY        | 2325         | 615   |
| NIRLON        | NIHAR NANDAN NILEKANI                             | SELL       | 2325         | 615   |
| PIXTRANS      | NK SECURITIES RESEARCH PRIVATE LIMITED            | BUY        | 98           | 1844  |
| PIXTRANS      | NK SECURITIES RESEARCH PRIVATE LIMITED            | SELL       | 98           | 1846  |
| RATNAVEER     | ARIHANT CAPITAL MARKETS LIMITED                   | SELL       | 1902         | 344   |
| RATNAVEER     | ARIHANT CAPITAL MARKETS LIMITED                   | BUY        | 1912         | 344   |
| RATNAVEER     | HRTI PRIVATE LIMITED                              | SELL       | 314          | 343   |
| RATNAVEER     | HRTI PRIVATE LIMITED                              | BUY        | 511          | 344   |
| RATNAVEER     | QE SECURITIES LLP                                 | BUY        | 666          | 344   |
| RATNAVEER     | QE SECURITIES LLP                                 | SELL       | 682          | 342   |
| SATTVAENGG    | CAPRIZE GLOBAL STORY LLP                          | SELL       | 155          | 52    |
| SATTVAENGG    | CAPRIZE INVESTMENT MANAGERS PRIVATE LIMITED       | BUY        | 155          | 52    |
| SBC           | ACME CAPITAL MARKET LIMITED                       | SELL       | 3054         | 59    |
| SBC           | ACME CAPITAL MARKET LIMITED                       | BUY        | 3092         | 59    |
| SBC           | FINBRIDGE SECURITIES PRIVATE LIMITED              | BUY        | 2925         | 59    |
| SBC           | GREENBUCKS SECURITIES (P) LTD                     | SELL       | 2457         | 59    |
| SBC           | GREENBUCKS SECURITIES (P) LTD                     | BUY        | 2771         | 59    |
| SBC           | HRTI PRIVATE LIMITED                              | BUY        | 1332         | 58    |
| SBC           | HRTI PRIVATE LIMITED                              | SELL       | 4822         | 59    |
| SBC           | RAPIDO SECURITIES PRIVATE LIMITED                 | BUY        | 1100         | 59    |
| SBC           | RAPIDO SECURITIES PRIVATE LIMITED                 | SELL       | 3247         | 59    |
| SIMPLEXINF    | KEDIA SECURITIES PRIVATE LIMITED                  | SELL       | 500          | 240   |
| SKYTECH       | MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITEI | BUY        | 30           | 39    |
| SKYTECH       | MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITEI | SELL       | 53           | 39    |
| SSRETAIL      | PLUTUS WEALTH MANAGEMENT LLP                      | SELL       | 411          | 721   |
| SSRETAIL      | PLUTUS WEALTH MANAGEMENT LLP                      | BUY        | 411          | 721   |
| SWASTIKAIN    | VARADA TRADING PRIVATE LIMITED                    | SELL       | 172          | 203   |

## Bulk Deals

| Security Name | Client Name                                    | Buy / Sell | Qty (in 000) | Price |
|---------------|------------------------------------------------|------------|--------------|-------|
| SWASTIKAIN    | WEALTH 4 U HOSPITALITY CONSULTANCY PRIVATE LIM | BUY        | 364          | 211   |
| TARIL         | ALPHAGREP SECURITIES PRIVATE LIMITED           | SELL       | 1731         | 289   |
| TARIL         | ALPHAGREP SECURITIES PRIVATE LIMITED           | BUY        | 1731         | 290   |
| TARIL         | JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED   | BUY        | 1645         | 290   |
| TARIL         | JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED   | SELL       | 1645         | 289   |
| TARIL         | MICROCURVES TRADING PRIVATE LIMITED            | BUY        | 3167         | 289   |
| TARIL         | MICROCURVES TRADING PRIVATE LIMITED            | SELL       | 3167         | 289   |
| TARIL         | QE SECURITIES LLP                              | SELL       | 1573         | 290   |
| TARIL         | QE SECURITIES LLP                              | BUY        | 1589         | 290   |

Block Deals

| Security Name | Client Name           | Buy / Sell | Qty (in 000) | Price   |
|---------------|-----------------------|------------|--------------|---------|
| EDELWEISS     | PABRAI WAGONS ETF     | BUY        | 14,572       | 142.7   |
| EDELWEISS     | PABRAI WAGONS FUND    | SELL       | 14,572       | 142.7   |
| NIRLON        | INRE FUND II          | BUY        | 2,325        | 615.0   |
| NIRLON        | NIHAR NANDAN NILEKANI | SELL       | 2,325        | 615.0   |
| NUVAMA        | PABRAI WAGONS ETF     | BUY        | 520          | 1,652.5 |
| NUVAMA        | PABRAI WAGONS FUND    | SELL       | 520          | 1,652.5 |

## Global Macro Events

| Event                                | Previous        | Forecast |
|--------------------------------------|-----------------|----------|
| <b>Japan</b>                         |                 |          |
| S&P Global Composite PMI Final       | 53.50           | 52.50    |
| S&P Global Services PMI Final        | 52.50           | 51.60    |
| Consumer Confidence                  | 35.50           | 35.30    |
| <b>Germany</b>                       |                 |          |
| S&P Global Composite PMI Final       | 51.80           | 53.80    |
| S&P Global Services PMI Final        | 49.70           | 52.90    |
| 3-Month Bubill Auction               | 0.02            | 0.00     |
| 9-Month Bubill Auction               | 0.03            | 0.00     |
| <b>US</b>                            |                 |          |
| NY Fed Bill Purchases 4 to 12 months | \$1.946 billion |          |
| S&P Global Composite PMI Final       | 56.00           | 58.40    |
| S&P Global Services PMI Final        | 56.50           | 58.70    |
| ISM Services PMI                     | 55.40           | 55.70    |
| ISM Services Business Activity       | 61.70           |          |
| ISM Services Employment              | 47.80           |          |
| ISM Services New Orders              | 60.90           |          |
| ISM Services Prices                  | 72.60           |          |
| 3-Month Bill Auction                 | 0.04            |          |
| 6-Month Bill Auction                 | 0.04            |          |

## Nifty Spot – Pivot Levels 05/10/2026

|       | Closing  | Support |       |       | Resistance |       |       |
|-------|----------|---------|-------|-------|------------|-------|-------|
|       |          | 1       | 2     | 3     | 1          | 2     | 3     |
| Nifty | 22421.95 | 22220   | 22025 | 21830 | 22615      | 22810 | 23010 |



Previous week it was mentioned that **Our view is Sell on Rise & below 23021 traders should use (22381-21300) levels as an opportunity to buy. If the trend is strong Nifty will bounce back from 22381 levels, any close below should be treated as negative for the current uptrend. Currently, (23808-24295)-24690-(25080-25640) as sell areas. If sustain above 25640 we open for 26347 and later further to 26500-26700 area.**

**As highlighted in the previous week's update, Nifty crossed below 23021 & witnessed sharp selling pressure, extending its decline to mark a low of 22217.65. During the correction phase, the index formed a series of Down Gaps, reflecting sustained selling pressure and initially moved towards the 22381 (1st support area). However, Nifty failed to sustain above this support zone and subsequently breached the 1st support level, leading to further weakness. Thereafter, some recovery was observed from the lower levels, but the index remained under pressure and finally closed at 22421.95, indicating continued bearish momentum.**

Below 22217 (current week low), we have support levels at (21575-20447) as bounce back levels. If the trend is strong Nifty will bounce back from 21575 levels, any close below should be treated as negative for the current uptrend.

As of now, (23193-23800)-24285-(24770-25465) as sell level areas.

If sustain above 25465 we open for 26347 and later further to 26500-26700 area.

**Our view is negative & below 23021 traders should use (21575-20447) levels as an opportunity to buy. If the trend is strong Nifty will bounce back from 21575 levels, any close below should be treated as negative for the current uptrend. Currently, (23193-23800)-24285-(24770-25465) as sell areas. If sustain above 25465 we open for 26347 and later further to 26500-26700 area.**

The 200 SMA is at 24351.10.

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

## Bank Nifty Spot – Pivot Levels 05/10/2026

|            | Closing  | Support |       |       | Resistance |       |       |
|------------|----------|---------|-------|-------|------------|-------|-------|
|            |          | 1       | 2     | 3     | 1          | 2     | 3     |
| Bank Nifty | 54450.75 | 53980   | 53510 | 52955 | 55005      | 55560 | 56030 |

BANKNIFTY · 1D · NSE O 54583.05 H 55090.70 L 54070.15 C 54450.75 -182.30 (-0.33%)

0.00 BUY 0.00 0.00 SELL

MA 200 close 0 57126.84



Previous week it was mentioned, **our view is Sell on Rise & below 55341 traders should use (54733-53074) levels as an opportunity to buy. If the trend is strong Bank Nifty will bounce back from 54733 levels, any close below should be treated as negative for the current uptrend. Currently, (56861-57798)-58555-(59310-60400) as sell level areas. If sustain above 60400 we open for 61765 and later further to (62540-63470) area.**

Bank Nifty opened at 55347.80 & slipped further, crossing below 55341 (previous week's low). Selling pressure intensified as the index breached the 1st support area of 54733 and continued to decline, forming Down Gaps marking a low of 53785.70. Thereafter, buying interest emerged at lower levels, leading to a sharp bounce-back rally that lifted Bank Nifty to a high of 55135.50. However, the index failed to sustain above higher levels and witnessed a minor correction thereafter. Finally, Bank Nifty closed at 54450.75, reflecting continued weakness despite the recovery from the day's low.

Below 53785 (current week low), we have support levels at 53074-(51021-47700) as bounce back levels. If the trend is strong Bank Nifty will bounce back from 51021 levels, any close below should be treated as negative for the current uptrend.

As of now, (55670-56834)-57775-(58716-60050) as sell level areas.

If sustain above 60050 we open for 61765 and later further to (62540-63470) area.

**Our view is Negative & below 53785 traders should use 53074-(51021-47700) levels as an opportunity to buy. If the trend is strong Bank Nifty will bounce back from 51021 levels, any close below should be treated as negative for the current uptrend. Currently, (55670-56834)-57775-(58716-60050) as sell level areas. If sustain above 60050 we open for 61765 and later further to (62540-63470) area.**

The 200 SMA is at 57126.84.

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## IOL Chemicals and Pharmaceuticals Ltd – Technical Stock Call – 05/10/2026

| Technical Stock Call | Action | CMP    | Target | Support              | SL  |
|----------------------|--------|--------|--------|----------------------|-----|
| IOLCP                | BUY    | 209.39 | 280    | (202-196) -(187-182) | 173 |



**Sector:** Pharmaceuticals & Chemicals (INE485C01029)

**About:** IOL Chemicals & Pharmaceuticals Ltd. (IOLCP) is an integrated API and specialty chemicals manufacturer. Its portfolio includes APIs such as **Ibuprofen, Metformin, Paracetamol and Clopidogrel**, along with specialty chemicals, with customers across domestic and international markets.

### View – Medium Term Bullish

The primary move in the stock commenced from 144.65 (JUL 2026).

Stocks started trading above their key averages & after forming a higher bottom at 155.06 (AUG 2026), gradually gained momentum to mark a high of 219.04 (SEP 2026).

Thereafter, lower tops emerged, leading to a sharp correction that dragged the stock down to 173.55 (SEP 2026). However, the stock respected the trend line support & subsequently entered a consolidation phase, trading within the range of 173.55–212.99. Recently, after forming higher bottoms, the stock has delivered a **Symmetrical Triangle Breakout** on the daily chart, supported by volumes. The breakout was accompanied by a bullish candle, which marked a high of 213.55 (SEP 2026), moving above the previous swing highs.

**The breakout above the consolidation range indicates improving price momentum, while sustained trading above the breakout zone could strengthen the positive structure further.**

**Indicators like Stoch RSI & PVT suggests positive crossover. The 200 SMA is in rising mode.**

Target of **280** is expected with lower support levels at **(202-196) -(187-182)** in case of intermediate fall.

A stop loss at **173** is to be followed for the trade.

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

## Dynatomic Technologies Ltd – Technical Stock Call – 05/10/2026

bigala created with TradingView.com, Oct 02, 2026 08:35 UTC

Dynatomic Technologies Limited · TW · NSE O13,380 H13,996 L12,723 C13,756 +603 (+4.58%) Vol170.96K

Vol 170.96K  
EMA (34, close) 10,864  
EMA (95, close) 10,151  
EMA (89, close) 9,280.4  
SMA (200, close) 6,893.2



TradingView

**View-Long Term Bullish**

**Dynatomic Technologies Limited – (13756)**

**TARGET 21000**

Primary move in stock commenced from **5444 (APRIL 2025)**.

Series of higher bottom formation followed with volume support, and the stock made a high of **12875 (MAY 2026)**.

**During its uptrend, Multiple times the stock took support of averages and bounced back.**

**200 SMA** is also in rising mode.

Recently after consolidation the stock has given a **triangle pattern** breakout with positive price candle supported by volume making a **high of 13996, which is above previous all-time high.**

**Stochastic Momentum Index, MACD & Aroon Up Down suggest Positive uptrend.**

Probability of Further Up Move is very high.

Target of **21000** is expected with lower support levels at **(13000-12385)-11893-(11398-11115)** case of intermediate fall.

A stop loss at **10790** is to be followed for the trade.

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<http://goo.gl/8bCMY>

## Stock specific news

### Pulse Duty Cut In Focus

India is considering lowering import duties on lentils and yellow peas to improve domestic supply after the weak monsoon. Current duties are 10% on red lentils and 30% on yellow peas; lower tariffs could ease food inflation but pressure domestic pulse realisations. Reuters Reuters

### US-India Deal Still Distant

US Trade Representative Jamieson Greer said an India-US trade agreement is not imminent, despite continuing negotiations with Commerce Minister Piyush Goyal. The lack of an immediate breakthrough keeps tariff uncertainty elevated for Indian exporters, particularly engineering, textiles, chemicals and auto components. Reuters Reuters

### Chinese Steel Tariffs Rise

At the G20 trade meeting, 28 mostly Western countries agreed to increase tariffs on Chinese steel amid concerns over excess capacity and subsidised exports. Higher trade barriers could alter global steel flows and provide some protection to Indian steel producers. Reuters Reuters

### G20 Challenges China Surplus

G20 members failed to reach consensus on China's excess industrial capacity, while the US pushed for stronger trade remedies and questioned the existing MFN framework. Escalating protectionism remains relevant for Indian metals, chemicals, electronics and renewable-equipment manufacturers. Reuters Reuters

### India-Canada Talks Resume

India and Canada begin the fifth round of CEPA negotiations on 5 October, targeting completion by year-end. A successful agreement could reduce tariffs and improve market access for Indian pharmaceuticals, textiles, chemicals, steel, seafood and electronics. The Economic Times Economic Times

### Export Insurance Cover Raised

The government extended RoDTEP support to 31 December 2026 and raised export-credit insurance coverage for specified West Asian shipments to 95%. The move reduces trade-finance and receivable risks for exporters facing higher geopolitical and logistics disruption. The Economic Times Economic Times

### Customs Warehousing Gets Tighter

Proposed customs rules would require bonded warehouses to electronically report shortages or discrepancies within 24 hours and retain digital records for five years. Tighter traceability could increase compliance costs but improve customs monitoring and reduce leakage. The Economic Times Economic Times

### FCNR Cushion Faces Limits

FCNR inflows have added roughly \$100 billion to India's forex reserves, cushioning the rupee and balance of payments despite weak FII flows. However, the support may fade as deposits are absorbed, leaving sustained foreign portfolio inflows important for external stability. ETBFSI.com ETBFSI

### Pension Funds Eye Infrastructure

PFRDA is exploring ways to allow pension savings greater exposure to large infrastructure projects, including possible direct investment. Long-duration pension capital could provide an additional funding source for roads, power, transport and other infrastructure assets. The Economic Times Economic Times

### Korean Chip Exports Explode

South Korean exports jumped 83.5% YoY to a record \$120.9 billion in September, with semiconductor exports surging 262.8% to \$60.3 billion on AI infrastructure demand. The data provides a strong global semiconductor-demand read-through for Indian electronics and semiconductor-linked companies. Reuters Reuters

## Urea Subsidy Burden Surges

The Centre is absorbing around ₹2,700 per 45-kg urea bag, while global costs have risen towards ₹3,000. The widening subsidy burden could increase pressure on the fertiliser budget if elevated energy and input prices persist. [NewKerala.com](#) [Economic Times](#)

## Farm Growth Forecast Cut

ICRA cut FY27 agriculture, forestry and fishing growth forecast to around 1% from 1.3% after India's weakest monsoon since 2015. Kharif sowing was down 1.2%, while depleted reservoirs create additional rabi and rural-demand risks. [Moneycontrol](#) [Moneycontrol](#)

## Palm Oil Buying Accelerates

Indian refiners bought more than 200,000 tonnes of crude palm oil after the government reduced edible-oil import duties and inventories fell. Restocking ahead of Diwali and the wedding season could support edible-oil demand while pressuring domestic oilseed economics. [The Economic Times](#) [Economic Times](#)

## GST Inversion Relief Considered

Pharma, textiles, footwear, fertilisers, renewables and EV manufacturers are seeking relief from accumulated input-tax credits caused by inverted GST structures. The GST Council is considering broader refunds, which could improve working capital and reduce embedded costs across these sectors. [The Financial Express](#) [Financial Express](#)

## Gold Import GST Relief At Risk

The GST Council may withdraw the IGST exemption on gold, silver and platinum imports by banks and nominated agencies. The move is aimed partly at limiting non-essential imports and foreign-exchange outflows and could alter bullion-import economics. [The Economic Times](#) [Economic Times](#)

## Insurance ITC May Improve

The GST Council may allow employers to claim input-tax credit on employee insurance premiums currently subject to 18% GST without ITC. If approved, the change could reduce corporate insurance costs and improve demand economics for group-insurance products. [The Economic Times](#) [Economic Times](#)

## GST Prosecution Rules May Ease

The GST Council is considering ending direct arrest powers for tax officials and raising the criminal-prosecution threshold to ₹5 crore. Smaller disputes could shift towards civil penalties, potentially reducing compliance uncertainty for businesses. [The Economic Times](#) [Economic Times](#)

## E-Commerce GST Rules May Ease

Small e-commerce sellers could be allowed to operate nationwide using one registered business address rather than separate registrations across states. The proposal could lower compliance costs and support formalisation of smaller online merchants. [The Economic Times](#) [Economic Times](#)

## Passenger Vehicle Demand Surges

September passenger-vehicle wholesales rose around 21% YoY to 4.6 lakh units, supported by GST changes, new launches and festive stocking. Maruti's domestic sales rose 36.5%, Tata PV sales 15.3% and M&M utility vehicles 14%, although H2 growth faces a higher base. [ETAuto.com](#) [ET Auto](#)

## Rural Auto Demand Weakens

Weak monsoon conditions hit rural vehicle demand: tractor sales fell 21% at M&M and 16.7% at Escorts Kubota, while Bajaj Auto's two-wheeler sales declined 12%. The divergence between urban PV strength and rural demand remains important for the auto and rural-consumption sectors. [Reuters](#)

## IT Earnings Face AI Pressure

Indian IT firms are heading into a weak September quarter, with brokerages estimating only 0.7–3.5% QoQ revenue growth for the largest players. AI-led pricing pressure and cautious US client spending could lead to FY27 guidance cuts, keeping the sector under earnings pressure. Reuters Reuters

## Pharma Gets Specialty Tariff Relief

The US has granted zero-tariff treatment to qualifying specialty medicines and ingredients from India and other jurisdictions. The relief covers rare-disease drugs, nuclear medicines, plasma therapies, ADCs and cell/gene therapies, reducing near-term tariff risk for India's specialty-pharma and CDMO segments. The Financial Express Financial Express

## CBG Push Gets ₹23,731 Cr

The government launched the ₹23,731 crore GOBARdhan scheme for FY27–FY36, targeting nearly a tenfold increase in domestic compressed-biogas production to around 5 MMSCMD. The framework provides assured offtake, stable pricing, capital assistance and financing support for CBG projects. Press Information Bureau PIB

## PNG Expansion Gets New Push

PNGRB launched National PNG Drive 3.0 and the MyPNG digital portal to accelerate household access to piped natural gas. The initiative supports wider gas-network penetration and could increase long-term demand for city-gas distribution infrastructure and equipment. Press Information Bureau PIB

## Tamil Nadu Gets Barrierless Tolling

NHAI launched Tamil Nadu's first multi-lane free-flow tolling system at Paranur on NH-179B, using ANPR and FASTag. The technology reduces toll-plaza infrastructure and operating costs while improving traffic throughput, supporting the highway digitisation and tolling ecosystem. Press Information Bureau PIB

## Bengal Highways Get ₹509 Cr

Nitin Gadkari announced ₹508.66 crore for strengthening and selective widening of 91.9 km of NH-14 and 56.4 km of NH-114 in Birbhum. The project should support near-term road-EPC activity and regional freight connectivity. The Economic Times Economic Times

## AP Housing Gets ₹3,600 Cr

The Centre sanctioned 3 lakh permanent houses worth ₹3,600 crore for Andhra Pradesh under PMAY-Gramin 2.0. A separate pilot for 177 3D concrete-printed houses worth ₹14 crore was also launched, creating a fresh construction-material and housing technology opportunity. Press Information Bureau PIB

## Supercomputing Capacity Expands

India's National Supercomputing Mission has deployed 40 systems with 68 petaflops as of September, including 13 systems above 1 PF. Another 1,500 indigenous Rudra servers are under manufacturing, supporting domestic HPC, AI, research and electronics-manufacturing capabilities. Press Information Bureau PIB

## Rafale Deal Could Close FY27

The IAF chief indicated India could finalise the proposed 114 Rafale fighter-jet acquisition within FY27, subject to ongoing price and procurement discussions. A deal would be significant for India's defence-capex pipeline and domestic aerospace manufacturing opportunities. The Economic Times Economic Times

## India-China Supply Chains Thaw

India-China economic engagement is gradually improving through resumed flights, expanded visas and easing restrictions on selected Chinese investment. The development matters for Indian electronics and pharmaceutical manufacturers that remain dependent on Chinese components, APIs and industrial inputs. Reuters Reuters

## Macro / Non-Stock News

### Nifty Extends Historic Weakness

Nifty 50 fell 198.50 points (-0.88%) to 22,421.95 on 1 October, while Sensex declined 570.59 points (-0.79%) to 71,909.70. Nifty touched 22,217.30 intraday, with Auto, Metal, FMCG, Realty and Consumer Durables under pressure, while IT outperformed. The Nifty has now entered an eighth consecutive weekly decline, the longest such streak in 25 years. Moneycontrol Moneycontrol market close

### FII Selling Nears ₹10,000 Cr

FIIs sold a massive ₹9,484 crore on 1 October, extending their selling streak to six sessions; cumulative outflows over those six sessions reached roughly ₹43,687 crore. DIIs bought ₹10,042 crore, keeping combined institutional flows marginally positive. Persistent foreign selling remains the biggest domestic market overhang despite strong DII absorption. Moneycontrol Moneycontrol FII-DII data

### 22,200 Becomes Key Support

Nifty's immediate support is around 22,200, with a decisive break potentially taking the index towards 22,000. Weekly options show maximum Call OI at 23,000, while Put OI is concentrated at 22,300, followed by 22,200. India VIX jumped 7.15% to 14.45, while PCR declined to 0.77, keeping the derivatives setup bearish despite oversold conditions. Moneycontrol Moneycontrol October 5 trade setup

### Rupee Falls To 96.31

The rupee fell 0.5% to ₹96.31/\$ on 1 October, its weakest level in two months. US 10-year yields reached 5.34%, Brent reclaimed \$100/bbl, and the dollar index rose about 0.5% towards 102. The combination of oil, high global yields and FPI selling is increasing pressure on the INR and imported inflation. Reuters Reuters rupee update

### RBI Rate Hike In Focus

The RBI MPC meets 5–7 October, with the policy decision due on 7 October. A Financial Express survey found 80% of economists expect a 25-bp hike to 5.50% from 5.25%, driven by crude, food inflation and resilient growth. A hike would mark the first increase since February 2023 and could pressure rate-sensitive equities and bonds. The Financial Express Financial Express RBI poll

### GST Collections Stay Robust

September gross GST collections increased 14.7% YoY to ₹2.04 lakh crore, while net collections after refunds rose 18.1% to ₹1.77 lakh crore. Domestic GST revenue increased 10.1%, while import-linked GST jumped 25.9% to ₹65,525 crore. The numbers provide a positive consumption/revenue signal, although the stronger import component warrants monitoring. The Financial Express Financial Express GST data

### Manufacturing PMI Rebounds

India's September manufacturing PMI rose sharply to 55.1 from 52.8, a seven-month high, as new orders and output strengthened on domestic and overseas demand. The improvement provides a positive counterweight to the weak equity market and supports the case for resilient underlying economic activity. Moneycontrol Moneycontrol manufacturing PMI

### Imported Inflation Risks Rise

The Finance Ministry's September Economic Review flagged high crude, geopolitical tensions and tighter global financial conditions as risks to India's inflation, rupee and capital flows. August retail inflation was 4.82%, while WPI inflation had risen to 9.92%. Forex reserves at \$765.9 billion provide an important external buffer, equivalent to about 11.1 months of import cover. Reuters Reuters India macro review

### OPEC+ Keeps Output Unchanged

OPEC+ agreed on 4 October to keep November production targets unchanged. The seven core members produced around 25 mbpd in August, still roughly 5 mbpd below pre-war February levels, while about 2 mbpd of cuts remain in place. With the physical market still tight and Brent above \$100, the decision offers limited relief to oil-importing economies such as India. Reuters Reuters OPEC+ decision

### Houthi Attack Lifts Oil Risk

Brent rose to \$103.06/bbl early Monday after Yemen's Iran-backed Houthis said they had launched missiles and drones against Saudi Aramco facilities in Riyadh and the Khurais region. The attack increases the risk of further Saudi supply disruption and adds an immediate negative variable for India's inflation, CAD and INR. Reuters Reuters oil update

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