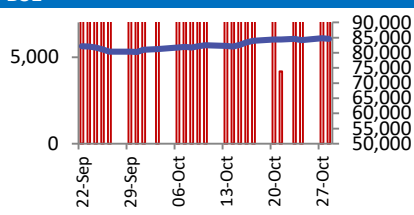
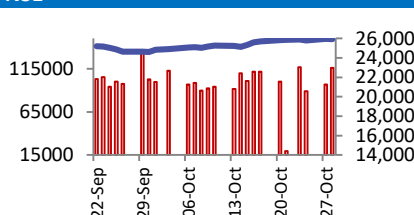


BSE			NSE		
	Open	84751		Open	25984
	High	84907		High	26032
	Low	84313		Low	25845
	Close	84404		Close	25878
	Change	-593		Change	-176
	Volume (Lacs)	8338		Volume(Lacs)	61767
	Turnover (Rs.inCr)	9188		Turnover(Rs.in Cr)	102486

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	47522	47632	(110)	-0.23%
Dow Futures	47662	47677	(15)	-0.03%
Nasdaq	23581	23958	(377)	-1.57%
FTSE	9760	9756	4	0.04%
Nikkei	51948	51326	623	1.21%
Hang Seng	26133	26283	(150)	-0.57%
Gift Nifty	26030	26042	(13)	-0.05%
Straits Singapore	4427	4437	(10)	-0.23%
South Korea	4108	4087	21	0.52%
Taiwan	28402	28288	115	0.41%
Shanghai	3964	3987	(23)	-0.57%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	10917	11184	(267)	-2.4%
Alumin (\$/MT)	2864	2887	(24)	-0.8%
Zinc (\$/MT)	3038	3083	(45)	-1.5%
Brent Crude (\$/bbl)	65	65	(0)	-0.6%
Gold (\$/Ounce)	4011	4025	(14)	-0.3%
Silver (\$/Ounce)	49	49	0	0.0%
Light Crude (\$/bbl)	60	61	(0)	-0.6%
N G (\$/mmbtu)	4	4	0	2.6%
Sugar (\$/MT)	414	418	(4)	-0.9%
Rubber (Rs./kg)	187	188	(1)	-0.5%
Baltic Dry Index	1983	1961	22	1.1%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	88.70	88.20	0.57%
Rs./ Euro	103.04	102.69	0.34%
Rs./Chinese Yuan	12.48	12.48	0.01%
Yen / \$ rate	153.87	154.13	-0.17%
\$ US/Euro	1.16	1.16	0.03%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.49	99.53	-0.04%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	25800	58190
Support 2	25730	58000
Resistance	25990	58600

Securities in Ban For Trade
NIL

Market Review

US: The U.S. stock market sank from its record heights on Thursday, as Wall Street sifted through mixed developments on everything from the U.S.-China trade war to profits for Big Tech behemoths.

Asia: Asian shares are set for a seventh straight month of gains on Friday, after upbeat earnings from Amazon and Apple buoyed Wall Street futures and the dollar hovered near three-month highs on uncertainty over further Federal Reserve rate cuts.

India: On Thursday, the Indian stock market ended with steep losses, and the benchmark Nifty 50 closed below 25,900 level.

Market is expected to open on a flattish note and likely to witness range bound move during the day.

Global economy:

Washington's decision to delay a rule on export restrictions for Chinese companies, announced by China after Thursday's summit meeting with U.S. President Trump, could end up making the measure ineffective, former U.S. officials said. The one-year suspension of the so-called affiliates rule, which had sought to prevent sanctioned Chinese companies from using subsidiaries to bypass U.S. controls on tech exports.

U.S. Federal Reserve Vice Chair for Supervision Michelle Bowman plans to reorganize the agency's supervision and regulation division and cut the unit's staff by about 30%, The reduction will be through attrition, retirements and voluntary separation incentives.

Japanese Minister of Finance Satsuki Katayama said the government has been monitoring foreign exchange movement with a high sense of urgency, her strongest comment on currency since assuming the role last week as the yen sits at a nine-month low.

Commodities: Oil prices eased on Friday, heading for a third straight monthly decline, as a stronger dollar capped commodities gains while rising supply from major producers globally offset the impact of Western sanctions on Russian exports.

Gold prices edged higher on Friday, and were on track for a third straight monthly gain, as bargain hunting and a Federal Reserve interest rate cut lifted demand, while investors digested a tentative trade deal between China and the U.S.

Currency: The U.S. dollar held its ground in early Asian trade on Friday after reaching a three-month high as traders processed mixed signals from this week's central bank decisions, tech sector earnings and a tentative U.S.-China tariff truce.

FII Derivative Transactions (Rs. Cr)

Contracts	Purchase		Sell		Net	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value	Value	Contract	Value	Contract	Value	Contract	Value
Index Future	8096	1589	20230	3979	(2390)	167268	32906	158146	31338	9122	1568
Index Option	5336235	1043182	5289237	1033248	9934	1906576	371156	1471380	288588	435196	82568
Stock Future	260155	18191	320244	21770	(3579)	5892355	400451	5883466	402227	8889	(1776)
Stock Option	298038	21569	301829	21826	(257)	255490	17389	205701	14017	49789	3372
Total	5902524	1084531	5931540	1080823	3708	8221689	821902	7718693	736170	502996	85732

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
23-Oct-25	21625	22422	(797)
24-Oct-25	12056	11489	567
27-Oct-25	13234	12618	616
28-Oct-25	27381	17950	9431
29-Oct-25	12595	13375	(780)
Month to date- Oct	264305	243116	21189
FII (Prov.) (Rs Cr)	Buy	Sell	Net
24-Oct-25	11768	11147	622
27-Oct-25	11823	11879	(56)
28-Oct-25	28175	17835	10340
29-Oct-25	10191	12731	(2540)
30-Oct-25	9350	12428	(3078)
Month to date-Oct	249586	245163	4422
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
24-Oct-25	12476	12303	173
27-Oct-25	14602	12110	2492
28-Oct-25	16104	15022	1082
29-Oct-25	19535	13843	5693
30-Oct-25	14827	12357	2469
Month to date-Oct	295605	249879	45726
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
23-Oct-25	1578	2068	(490)
24-Oct-25	1738	2104	(366)
27-Oct-25	1502	1200	302
28-Oct-25	1407	880	527
29-Oct-25	3980	1669	2311
Month to date- Oct	51245	35746	15499

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1807	42%	1440	42%
Decline	2363	55%	1875	55%
Unchanged	161	4%	101	3%

Market Turnover	30-Oct	29-Oct	Var (%)
BSE Cash	9188	10975	-16%
NSE Cash	102486	112298	-9%
NSE Futures	105579	120763	-13%
NSE Options	11614307	10904595	7%
Total (Rs.Cr)	11831559	11148631	6%

Volatility Index	30-Oct	29-Oct
Volatility Index	12.07	11.97

Index PE - TTM	30-Oct	Yr. High	Yr. Low
Sensex	23.2	24.1	20.3
Nifty	22.8	23.0	19.6

Corporate News

BEL, the fresh orders include Software Defined Radios (SDRs), tank sub-systems, , cyber security solutions, upgrades, spares, and services, among others. BEL bags additional orders worth Rs 732 cr for SDRs and defence systems. (NDTV)

LTIMindtree , a leading global technology consulting and digital solutions provider, the launch of BlueVerse with OGI (Organizational General Intelligence), a next-generation agentic IT Service Management (ITSM) platform engineered to manage operational challenges faced by contemporary enterprises autonomously. (NDTV)

Tata Consultancy Services has entered into a five-year partnership with Tata Motors to advance the automaker's sustainability initiatives through digital transformation of environmental, social, and governance data management. The collaboration centers on Tata Motors' Prakriti platform. (BS)

Reliance Industries and Google have announced a strategic partnership that will provide eligible Jio users with 18 months of free access to Google AI Pro, a premium offering valued at Rs 35,100 per user. (TOI)

Economy

A tax tribunal's unusual decision has surprised many. It supported the tax department's move to charge 22% tax on capital gains. This is based on the company's other income tax rate. Experts believe this ruling may be challenged. The development could encourage similar stands from tax officials. This situation highlights how automated tax demands can proceed through appeals. (ET)

The United States has granted India a six-month exemption from sanctions for operations at Iran's Chabahar port. This waiver is crucial for India's regional connectivity plans, including trade with Afghanistan, Central Asia, and Russia, and bypasses Pakistan. India recently signed a 10-year agreement to operate the port. (ET)

International

Netflix is actively considering a bid for Warner Bros Discovery's studio and streaming business. The video streaming giant hired Moelis & Co, the same investment bank that advised Skydance Media. (Invst)

President Donald Trump's trade pact with South Korea could deal a major blow to the won when cash starts flowing out of the country to cover investment commitments in the U.S., though the pact will likely be a boon for the Kospi. In exchange for lower tariffs - duties on South Korean cars and auto parts are expected to fall to 15% from 25%. (Invst)

Top 5 Nifty Gainers	30-Oct	29-Oct	Var(%)
COALINDIA	388	382	1.5%
LT	3988	3958	0.7%
BEL	410	407	0.7%
HINDALCO	861	856	0.6%
NESTLEIND	1280	1273	0.5%
Top 5 Nifty Losers	30-Oct	29-Oct	Var(%)
DRREDDY	1202	1251	-3.9%
CIPLA	1540	1581	-2.6%
HDFCLIFE	747	761	-1.9%
BHARTIARTL	2066	2101	-1.6%
INDIGO	5725	5813	-1.5%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	84404	-0.7%	-0.2%	5.2%	6.3%
MIDCAP	47306	0.0%	1.3%	5.3%	2.9%
SMLCAP	54092	-0.1%	0.9%	3.6%	-1.6%
AUTO	59921	-0.4%	-1.3%	1.1%	11.9%
BANKEK	65298	-0.7%	-0.5%	6.2%	11.3%
Capital Goods	70120	0.1%	1.2%	2.7%	1.5%
FMCG	20710	-0.5%	-0.5%	3.0%	-4.4%
Health Care	44868	-0.4%	-0.8%	4.2%	2.2%
IT	35169	-0.5%	-0.5%	6.0%	-13.0%
METAL	35537	-0.5%	4.7%	6.9%	13.6%
Oil & Gas	28572	0.2%	3.9%	6.2%	4.1%
Power	6998	-0.2%	2.0%	4.2%	-10.6%
Realty	7387	0.0%	1.3%	9.6%	-5.4%

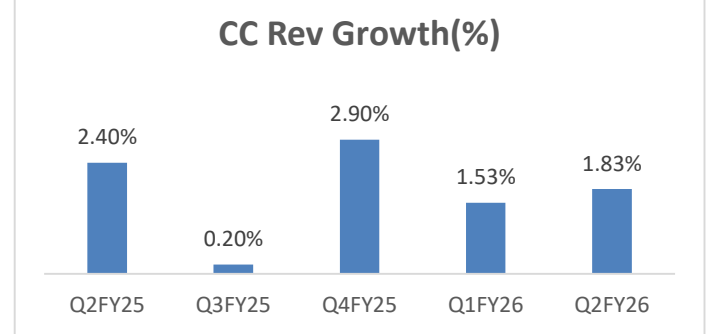
Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	109083	0.8%	0.6%	9.5%	19.2%
Fresh Exposure	4263	-5.5%	191%	-31.3%	-29.3%
Exposure liquidated	4847	31.7%	370%	-25.0%	-13.8%
Closing Net scripwise outstanding	108499	-0.5%	-0.3%	9.2%	18.1%

NSE USD Futures	30-Oct	29-Oct	Var (%)
Oct Expiry (Rs./\$)	88.03	88.27	-0.3%
Nov Expiry (Rs./\$)	87.77	88.03	-0.3%
Total Turnover (Rs. Crore)	4813	5696	-15%

Sectors	TTM PE
Auto	32.74
Auto Ancillary	43.6
Banking	14.59
Engineering	43.59
Cement	69.2
Diamonds & Jewellery	42.1
Housing Finance	23.77
Infrastructure & Const	26.99
Metals-Aluminium	29.44
Metal – Steel	18.3
Oil Expl.	8.25
Pharma	10.77
Power – Gen. Supp.	40.12
Information Tech.	31.42
Sugar	16.86
Telecom Serv. Prov.	39.78
Tyres	35.33

Mphasis CC QoQ Revenue

(Source: NBRR)



10 year G-Sec Yield	Current	Previous	Change
US	4.10%	4.10%	0 bps
Japan	1.65%	1.66%	(1) bps
India	6.57%	6.54%	4 bps
UK	4.42%	4.39%	3 bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	602	702	-14.3%
Inflation - WPI	0.52%	-0.58%	110 bps
Inflation - CPI	1.54%	2.07%	(53) bps

India GDP	Q3FY25	Q2FY25	Var (%)
Growth	7.81%	7.38%	43 bps

Monetary Policy	Current	Previous	Change
Repo Rate	5.50%	5.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	3.00%	4.00%	(100) bps
O/S Banking System Liquidity (Rs bn)	-48	20	(67.5)

IIP Growth %	Aug-25	Aug-24	Apr-Aug
IIP	4.0	3.2	3.5
Capital Goods	4.4	0.0	6.9
Mining	3.8	1.2	4.2
Manufacturing	4.1	-3.7	0.5
Electricity	6.0	-4.3	-2.5

ADR Price Movement

Company	Price (US\$)	Volume	Previous Day Price	Volume	Variance (%)	No. of Share Per ADR	ADR Price (Rs.)	BSE Price	Variance (%)
Infosys Tech	16.64	14127379	16.88	13848249	-1.42%	1	1475.99	1493.80	-1.2%
Wipro	2.67	11027008	2.67	9025622	0.00%	1	236.83	241.92	-2.1%
Dr.Reddy's	13.45	1193268	13.41	3612123	0.30%	1	1193.03	1202.20	-0.8%
ICICI Bank	30.73	5203248	31.02	3202039	-0.93%	2	1362.89	1362.40	0.0%
HDFC Bank	36.88	4950856	36.99	3429337	-0.30%	3	1090.43	998.15	9.2%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	44.85	45.80	(0.9)	-2.1%
RIL	67.00	67.70	(0.7)	-1.0%
SBI	105.80	106.40	(0.6)	-0.6%

US Economy Data	Current	Previous
Inflation (%) (YoY)	3.00%	2.90%
Unemployment (%)	4.30%	4.20%

Interest Rate (%)	Current	Previous
Fed Rate	4.00%	4.25%

US GDP	Q2CY25	Q1CY25
Growth (QoQ Annualized)	3.80%	-0.60%

China Economy Data	Current	Previous
GDP	4.80%	5.20%
Inflation – CPI (%)	-0.30%	-0.40%

Economic Calendar

	Date
Indian GDP Data	28 Nov
Indian Inflation Data CPI	12 Nov
Indian Inflation Data WPI	14 Nov
Indian Monetary Policy	05 Dec
India's Industrial Production (IIP)	28 Nov
US Inflation Data	13 Nov
US GDP	26 Nov
US Unemployment Data	07 Nov
US Fed Rate	10 Dec
China GDP	To be Announced
China Inflation Data	09 Nov

Event Update

Name	Date	Purpose
Garment Mantra Lifestyle Ltd. - (Partly Paid-up Equity Shares (Rights Issue))	31/10/25	Second and Final Call of Rs. 0.60 (Rupees Sixty paisa Only) (comprising of Rs.0.50/- towards face value and a premium of Rs. 0.10/-) per Rights Equity Share.
Modern Insulators Ltd.	31/10/25	Spin Off
PDS Ltd.	31/10/25	Interim Dividend

Bulk Deal As On 30/10/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539506	ADCON	AKARSHIKA TRADERS LLP	S	1073643	0.94
539506	ADCON	GAURI NANDAN TRADERS	S	3831622	0.91
539506	ADCON	GAURI NANDAN TRADERS	B	3832622	0.89
539506	ADCON	KAMLESH NAVINCHANDRA SHAH	S	1677657	0.89
539506	ADCON	KAMLESH NAVINCHANDRA SHAH	B	1660166	0.9
539506	ADCON	SIDDHANT SHIRISH SHAH	B	3756733	0.92
544529	APPL	PAULOMI KETANKUMAR DOSHI	S	66000	131.69
544529	APPL	SAUMIK KETANKUMAR DOSHI	S	104000	132.16
538713	ATISHAY	GHALLA BHANSALI STOCK BROKERS PRIVATE LIMITED	B	112223	153.03
542627	CHANDNIMACH	GREEN PEAKS ENTERPRISES LLP	S	20000	78.47
542627	CHANDNIMACH	GREEN PEAKS ENTERPRISES LLP	B	10650	78.47
542627	CHANDNIMACH	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	S	28667	78.47
540829	CHANDRIMA	PARNIT VENTURES PRIVATE LIMITED	B	1905379	9.46
540829	CHANDRIMA	PRAS INVESTMENT PRIVATE LIMITED	S	2000000	9.46
539559	DDIL	BHAVISHYA ECOMMERCE PRIVATE LIMITED	S	1241805	9.57
506180	EMERGENT	DAVOS INTERNATIONAL FUND	S	72000	610.6
506180	EMERGENT	ISQUARE GLOBAL PE FUND	B	72000	610.6
512443	GANONPRO	NAVRAAV ELECTRO LIMITED	B	49773	16.57
512443	GANONPRO	SARLA	S	52337	16.6
531913	GOPAIST	RAMESH RAVI	S	43782	6.31
505336	HARSHILAGR	SHARE INDIA SECURITIES LIMITED	S	6371921	0.66
505336	HARSHILAGR	SHARE INDIA SECURITIES LIMITED	B	3671418	0.66
544393	INFONATIVE	IFM INVESTMENT ADVISORS PRIVATE LIMITED	B	78400	35
504746	INLCM	VISHAL PRAVIN THAKKAR	S	50000	1700.9
512415	MERCTRD	NITIN BAKSHI	B	96242	9.23
512415	MERCTRD	SHITAL BHAVESHKUMAR SHAH	S	207194	8.89
542724	MURAE	EKLINGJI TRADELINK PRIVATE LIMITED	S	19602390	0.28
530805	OML	DIVYA KANDA	B	250000	7.44
530805	OML	MONA BATHEJA	B	318000	7.83
530805	OML	NEO APEX VENTURE LLP	S	599814	7.93
530805	OML	SUDHANSHU KANDA	B	230000	7.46
530805	OML	SUNIL SACHDEVA	S	161545	7.44
540386	ONTIC	DEEPAL PRAVINBHAI SHAH HUF	S	1195311	2.71
540386	ONTIC	DEEPAL PRAVINBHAI SHAH HUF	B	319158	2.7
540386	ONTIC	HINAL HARSH SHAH	S	620000	2.7
540386	ONTIC	NISHIL SHAH	S	1814450	2.71
540386	ONTIC	NISHIL SHAH	B	700000	2.7
540386	ONTIC	SHARE INDIA SECURITIES LIMITED	S	700000	2.7
540386	ONTIC	SHARE INDIA SECURITIES LIMITED	B	800001	2.71
543637	PACE	SHAIVAL D GANDHI	S	163200	24.3
536659	PVINFRA	VARANGA PROPERTIES PRIVATE LIMITED	S	770371	3.92
539495	RAJKOTINV	HIRISE INFRACON LIMITED	B	24801	47.5
539495	RAJKOTINV	KAMAL JAGDISH GUPTA	S	24801	47.5
519191	RGRL	KOLE RAMCHANDRA MOHANDE	B	199285	2.76
519191	RGRL	NIRUBEN PRAMODBHAI PAREKH	B	350000	2.8
519191	RGRL	SOMNATH NANDA	S	800852	2.78
530929	RRPDEFENSE	GROWTH SECURITIES PRIVATE LIMITED	S	10168	891.7
530929	RRPDEFENSE	NEO APEX VENTURE LLP	S	13000	891.7
544582	SHLOKKA	JYOTI KHANDLWAL	S	211200	60.13
544582	SHLOKKA	RATHOD MANOJ CHHAGANLAL HUF	B	128400	60
543924	SONALIS	VINCE KAVALLAKKATT DAVIS	B	26000	82.97
531370	SPAR	KIRTI M JAIN	S	55000	6.3
531370	SPAR	KIRTI MOHANLAL JAIN	B	85000	6.4
531205	SPRIGIT	FIELDSJOY ENTERPRISE PRIVATE LIMITED	S	19875029	0.8

539117	SUJALA	AKARSHIKA TRADERS LLP	B	40144	78.93
539117	SUJALA	NIRAJ RAJNIKANT SHAH	S	50000	79.14
531190	TAVERNIER	MNM STOCK BROKING PVT. LTD.	B	100250	48
531190	TAVERNIER	SILVERSTONE CONSULTANCY SERVICES PRIVATE LIMITED	S	100000	48
544565	VALPLAST	VINEY GROWTH FUND	S	172000	60.01
531997	VUENOW	DEVKA ART PRIVATE LIMITED	B	143000	74
531997	VUENOW	YAVA CORP GLOBAL LIMITED	S	150000	74

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ASALCBR	Asso Alcohols & Brew Ltd	EQUITY INTELLIGENCE INDIA PRIVATE LIMITED	BUY	100000	1160.6
ATALREAL	Atal Realtech Limited	METASONI ALLOYS PVT LTD	SELL	570000	24.31
BAGDIGITAL	B. A. G. Convergence Limitec	ACME CORPORATE ADVISORS PRIVATE LIMITED	SELL	294400	129.03
BAGDIGITAL	B. A. G. Convergence Limitec	CONNECT FUND	BUY	174400	128.76
BAGDIGITAL	B. A. G. Convergence Limitec	RAMAN TALWAR	SELL	126400	129.12
GCSL	Gretex Corporate Services	ANANDPODDAR	SELL	166212	225.17
INFIBPP	INFIBEAM Re.0.5 ppd up	MAYUR MUKUNDBHAI DESAI	BUY	7200000	12.6
INFIBPP	INFIBEAM Re.0.5 ppd up	SHAIVAL REALITY LIMITED	SELL	7200000	12.6
QUESTLAB	Quest Laboratories Ltd	YASH HITESH PATEL	BUY	120000	88.74
QUESTLAB	Quest Laboratories Ltd	YASHVI HITESH PATEL	BUY	237600	88.42
RELIANCE	Reliance Industries Ltd	BOFA SECURITIES EUROPE SA	BUY	295600	1475.5
RELIANCE	Reliance Industries Ltd	KADENSA MASTER FUND	SELL	295600	1475.5
VIAZ	Viaz Tyres Limited	DIPAK RAMNIKAL SHAH	BUY	66000	75
VIAZ	Viaz Tyres Limited	HETAL G RUPARELIA	SELL	80000	75
VJAYPD	Vijaypd Ceutical Limited	YASHVI HITESH PATEL	SELL	216000	45.93

Disclosure:

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