

Market Commentary

Overnight global action:

On 30th September 2026, US markets ended mixed, with the S&P 500 declining by 18.8 pts (-0.25%), Dow Jones falling by 441.1 pts (-0.86%), while Nasdaq 100 advanced by 69.2 pts (+0.23%). Gift Nifty declined by 3.0 pts (-0.01%), indicating a flat opening for Indian markets.

NSE breadth remained negative with 1,740 advances against 1,812 declines, while BSE witnessed 2,077 advances versus 2,314 declines.

Index Options Data Analysis:

Nifty Call and Put OI both peak at 22,700. PCR stands at 1.08.
Sensex OI peaks at 74,000 Calls and 70,000 Puts. PCR stands at 1.44.
Bank Nifty OI peaks at 54,300 Calls and 54,200 Puts. PCR stands at 1.33.

Securities in Ban for F&O Trade:

SAIL, BANDHANBANK

Sector Performance:

NIFTY MIDCAP SELECT index rose by 0.42 % driven by INDUSINDBK(+2.67%), PERSISTENT(+2.27%), SRF(+2.17%)

NIFTY NEXT 50 index rose by 0.41 % driven by SOLARINDS(+5.63%), ADANIPOWER(+3.92%), DLF(+3.22%)

NIFTY SMALLCAP 250 index rose by 0.29 % driven by IRCON(+13.69%), RITES(+10.42%), CUPID(+8.23%)

NIFTY 100 index declined by -0.26 % dragged by APOLLOHOSP(-5.70%), MAXHEALTH(-5.33%), VAML(-5.17%)

NIFTY MICROCAP 250 index declined by -0.26 % dragged by YATHARTH(-7.58%), MARKSANS(-5.92%), SPARC(-5.68%)

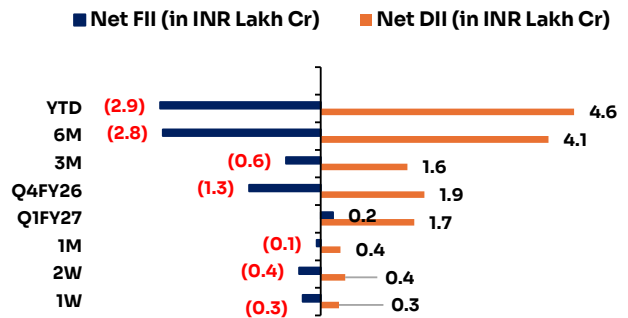
NIFTY INDIA FPI 150 index declined by -0.25 % dragged by FORTIS(-6.33%), APOLLOHOSP(-5.70%), MAXHEALTH(-5.33%)

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Fund Flow - 1st Oct 2026	Buy	Sell	Net
FII/FPI (INR Cr)	14,967.8	25,116.2	-10,148.4
DII (INR Cr)	24,413.8	13,142.0	11,271.7



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	22,657	-0.01%	-13.77%	20.5
Sensex 30	72,480	-0.07%	-14.95%	18.9
Nifty 50	22,620	-0.42%	-13.43%	20.5
India VIX	13	0.39%	42.11%	
Nifty Bank	54,633	0.69%	-8.31%	16.1
Nifty Next 50	69,747	0.41%	0.55%	69.7
Nifty 500	22,072	-0.13%	-7.54%	20.7
Nifty Mid 100	59,332	0.02%	-1.91%	30.5
Nifty Small 250	17,799	0.29%	6.68%	30.0
USD/INR	95.8	-0.16%	6.54%	
India 10Y	7.2%			
India 2Y	6.6%			
India 1Y	6.2%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,652	-0.25%	11.78%	33.1
Dow Jones	50,909	-0.86%	5.92%	24.6
Nasdaq 100	30,409	0.23%	20.43%	49.9
FTSE 100	10,606	-0.29%	6.79%	16.7
CAC 40	7,965	-0.89%	-2.27%	23.4
DAX	25,199	-0.79%	2.89%	26.3
Nikkei 225	66,754	1.94%	32.61%	35.6
Hang Seng	24,613	0.37%	-3.97%	12.0
Shanghai Comp	3,842	0.31%	-3.19%	17.4
KOSPI	6,838	-0.48%	62.26%	33.9
S&P/ASX 200	8,789	0.92%	0.86%	23.2

Stocks in the News

KPI GREEN ENERGY (CMP: 359, MARKET CAP: 7095 Cr., SECTOR: RENEWABLE ENERGY)

[NSE filing](#)

Signed a binding offer to acquire 100% of Alfanar Energy and Netra Wind, at an enterprise value of approximately ₹2,410 crore. The companies own 507.9 MW of operational wind capacity in Bhuj, Gujarat, backed by 25-year PPAs with SECI. Completion is expected by 28 February 2027, taking KPI's installed generation capacity from approximately 1.16 GW to 1.67 GW.

LARSEN & TOUBRO (CMP: 3760, MARKET CAP: 517337 Cr., SECTOR: ENGINEERING / INFRASTRUCTURE)

[NSE filing](#)

Executed two contracts with Dubai's Roads and Transport Authority for the Latifa Bint Hamdan Corridor. One contract is classified at ₹2,500–5,000 crore and the other at ₹1,000–2,500 crore; exact values were not disclosed. The scope includes roads, bridges, tunnels, an interchange and a cycling track, with both projects scheduled for completion by end-2028.

ADANI PORTS & SEZ (CMP: 1798, MARKET CAP: 414321 Cr., SECTOR: PORTS / LOGISTICS)

[NSE filing](#)

Inaugurated Phase II of Colombo West International Terminal, doubling annual container capacity from 1.6 million to 3.2 million TEUs. Total investment in the terminal is US\$750 million, under a 35-year build-operate-transfer concession. The expanded terminal can berth three ultra-large container vessels simultaneously; it handled 2 million TEUs in its first 18 months.

AMBUJA CEMENTS (CMP: 374, MARKET CAP: 92932 Cr., SECTOR: CEMENT)

[NSE filing](#)

Subsidiary ACC commissioned a 2.4 MTPA greenfield cement grinding unit at Salai Banwa, Uttar Pradesh. ACC's subsidiary Bulk Cement India commissioned a 3 MTPA blending unit at Kalamboli, Maharashtra, contributing 1 MTPA of additional cement capacity. These additions take Ambuja's consolidated cement capacity to 113.45 MTPA.

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	26,294	0.46%	-6.72%	21.7
Nifty IT	27,705	0.13%	-26.87%	21.6
Nifty Fin Ser	24,650	0.00%	-10.73%	16.1
Nifty Pharma	26,438	-1.84%	16.35%	43.5
Nifty Services	29,014	-0.50%	-13.79%	31.9
Nifty Cons Dur	36,628	-1.35%	-0.35%	49.6
Nifty PSE	9,360	0.18%	-5.01%	9.8
Nifty FMCG	44,508	-0.63%	-19.77%	30.7
Nifty Pvt Bank	26,696	0.95%	-7.05%	10.0
Nifty PSU Bank	8,016	0.54%	-6.06%	13.1
Nifty Cons	11,073	-0.74%	-9.90%	39.1
Nifty Energy	36,636	0.35%	3.71%	11.6
Nifty Health	16,138	-2.57%	10.23%	38.6
Nifty India Mfg	15,454	-0.36%	0.27%	28.8
Nifty Metal	12,761	-1.50%	14.26%	22.9
Nifty Oil & Gas	10,615	0.44%	-13.22%	16.3

Derivatives Position (Combined)

Stock	% Chg OI	%Chg LTP
Long		
PNBHousing	4.0	1.9
IRFC	5.7	0.7
PREMIERENE	3.7	1.6
RVNL	3.4	1.5
INDHOTEL	2.2	2.1
Short		
MAXHEALTH	19.2	-6.6
LICHSFIN	10.7	-4.6
FORTIS	3.8	-8.0
MANKIND	6.6	-1.8
BANDHANBNK	3.4	-3.3
Long Unwinding		
APOLLOHOSP	-1.0	-7.0
KALYANKJIL	-2.4	-3.0
ZYDUSLIFE	-0.5	-4.1
ETERNAL	-0.8	-3.3
SAIL	-1.2	-2.7
Short Covering		
LODHA	-13.2	1.9
ICICIGI	-4.7	3.7
PRESTIGE	-0.1	3.4
SOLARINDS	-1.1	1.9
ICICIBANK	-1.1	1.7

**ACME SOLAR HOLDINGS (CMP: 439, MARKET CAP: 31032 Cr.,
SECTOR: RENEWABLE ENERGY / BATTERY STORAGE)**

[Phase I filing](#) · [Phase III filing](#)

ACME Sigma Urja commissioned Phase I battery storage of 53.73 MW / 222.969 MWh at Neemri, Rajasthan. Separately, ACME Greentech Seventh commissioned Phase III of 53.63 MW / 214.52 MWh, taking that project's commissioned storage to 159.58 MW / 638.32 MWh. Both newly commissioned phases have a commercial operation date of 2 October 2026.

Commodities	CMP	1D	YTD
Gold (\$)	4,155	-0.04%	-3.96%
Silver (\$)	60.4	-0.03%	-16.6%

Currency	CMP	1D	YTD
USD/INR	95.8	-0.16%	6.54%
EUR/INR	108.7	-0.04%	2.90%
GBP/INR	127.2	-0.01%	5.08%
JPY/INR	0.6	-0.10%	6.20%
EUR/USD	1.1	0.00%	-3.58%

Securities Lending & Borrowing Scheme			
Company	Under.Ltp	Fut.Ltp	Spread (%)
BLUESTARCO	1,518.00	1,469.60	3.19
IREDA	111.68	108.97	2.43
IRFC	79.28	77.97	1.65
MAXHEALTH	929.80	916.50	1.43
LTM	4,045.00	3,994.00	1.26

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
CUPID	312	312	299	14-Aug-26
SUNTV	596	664	661	20-Apr-26
AZAD	2,990	3,128	2,998	29-Sep-26
SHILPAMED	1,042	1,075	1,075	21-Sep-26
LLOYDSENGG	98	104	103	29-Sep-26

52 Week Low

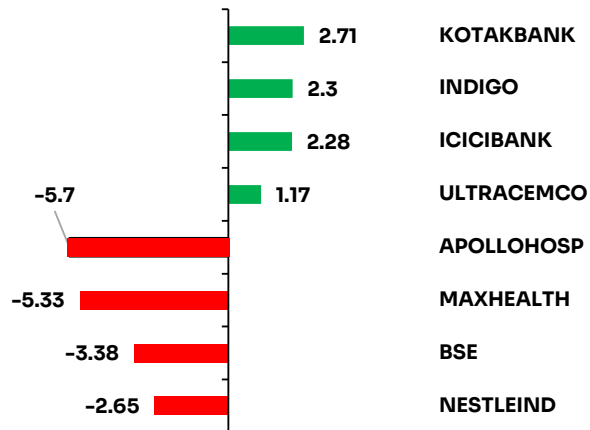
Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
RELIANCE	1,187	1,182	1,182	29-Sep-26
RELIANCE	1,187	1,182	1,182	29-Sep-26
ONGC	226	224	228	30-Jun-26
BRITANNIA	4,830	4,758	4,798	29-Sep-26
PFC	324	321	329	28-Sep-26

Volume Shockers

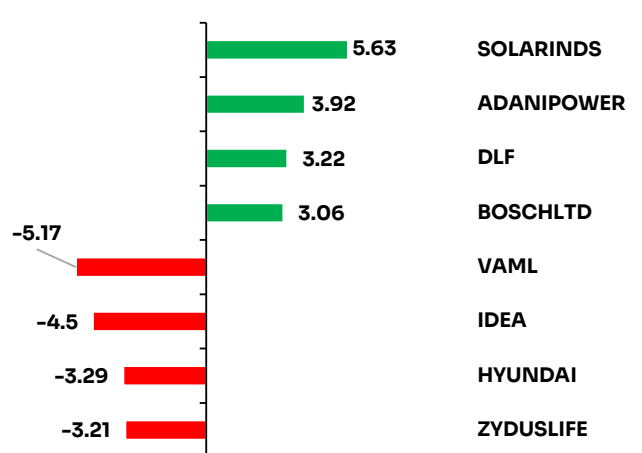
Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
BNAGROCHEM	102	1	1	218
BITES	50,416	393	376	212
TVSELECT	2,796	29	28	417
ESTER	3,657	42	40	101
ULTRAMAR	1,303	31	40	408
IRCON	76,654	2,028	2,040	117
JWL	24,061	677	694	232
MUNJALAU	9,221	288	276	110
MOGSEC	221	7	8	65
ESSARSHPNG	6,790	218	191	19
JSWHL	52	2	7	11,375
FAZE3Q	402	16	20	437
BLEL	15,602	648	577	485
BANK10BETF	10,013	421	232	20
KSB	5,216	238	201	860
ALICON	953	44	38	870
TPLPLASTE	2,013	102	116	71
PASHUPATI	2,779	159	151	74
HEALTHY	7,502	452	384	17
VESUVIUS	8,174	504	312	425
FSL	6,657	424	3,973	254
SUNTV	34,672	2,343	1,470	596
DIAMONDYD	165	11	11	1,110
RAILTEL	6,565	482	577	265
KREBSBIO	51	4	9	60

Top Gainers & Losers

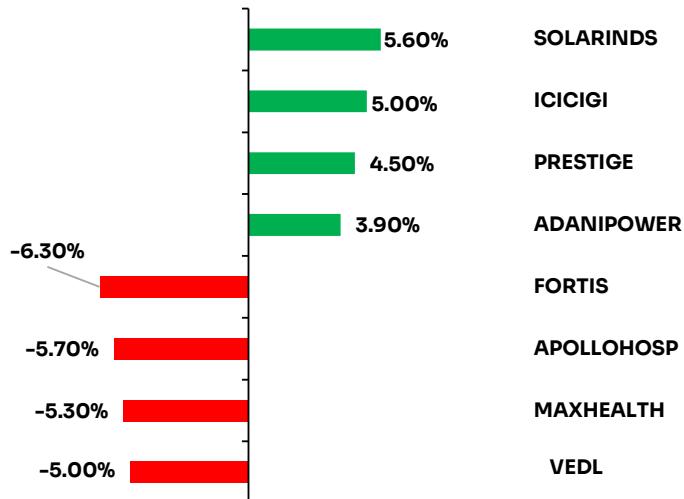
Nifty 50



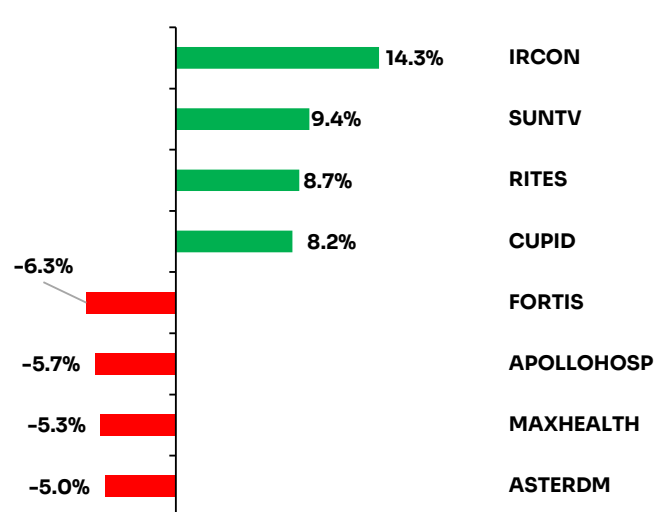
Nifty Next 50



Nifty 200



Nifty 500



Bulk Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price
AAREYDRUGS	ARYA RAVI MANIRAM	BUY	144	100
AHCL	NEO APEX SHARE BROKING SERVICES LLP	SELL	2702	35
AHCL	NEO APEX SHARE BROKING SERVICES LLP	BUY	5209	35
AMBANIORGO	ECHJAY FORGING INDUSTRIES PRIVATE LIMITED	SELL	50	115
AMBANIORGO	MANISH KIRITKUMAR SHAH (HUF)	BUY	50	115
ARMEE	CITADEL SECURITIES SINGAPORE PTE LIMITED	SELL	408	319
ARMEE	GRT STRATEGIC VENTURES LLP	SELL	370	326
ARMEE	GRT STRATEGIC VENTURES LLP	BUY	370	326
ARMEE	IRAGE BROKING SERVICES LLP	SELL	501	329
ARMEE	IRAGE BROKING SERVICES LLP	BUY	535	331
ARMEE	MICROCURVES TRADING PRIVATE LIMITED	SELL	173	321
ARMEE	MICROCURVES TRADING PRIVATE LIMITED	BUY	173	320
ARMEE	NEO APEX SHARE BROKING SERVICES LLP	SELL	181	309
ARMEE	NEO APEX SHARE BROKING SERVICES LLP	BUY	208	305
ARMEE	NEO APEX VENTURE LLP	SELL	181	306
ARMEE	NEO APEX VENTURE LLP	BUY	190	305
ARMEE	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	457	327
ARMEE	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	459	327
ARMEE	PACE STOCK BROKING SERVICES PVT LTD	BUY	269	331
ARMEE	PACE STOCK BROKING SERVICES PVT LTD	SELL	271	373
ARMEE	PATRONUS TRADETECH LLP	BUY	230	334
ARMEE	PATRONUS TRADETECH LLP	SELL	240	334
ARMEE	PURE BROKING PRIVATE LIMITED	SELL	287	327
ARMEE	PURE BROKING PRIVATE LIMITED	BUY	287	326
AXIOMGAS	ASHOK KUMAR JAIN	SELL	184	46
AXIOMGAS	STITCHED TEXTILES LIMITED	BUY	270	46
BLEL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	295	502
BLEL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	295	500
BLEL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	309	505
BLEL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	310	504
BLEL	HRTI PRIVATE LIMITED	SELL	376	500
BLEL	HRTI PRIVATE LIMITED	BUY	414	499
BLEL	IMC INDIA SECURITIES PRIVATE LIMITED	BUY	261	499
BLEL	IMC INDIA SECURITIES PRIVATE LIMITED	SELL	262	502
BLEL	IRAGE BROKING SERVICES LLP	SELL	205	502
BLEL	IRAGE BROKING SERVICES LLP	BUY	251	508
BLEL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	499	504
BLEL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	500	504
BLEL	MICROCURVES TRADING PRIVATE LIMITED	SELL	737	506
BLEL	MICROCURVES TRADING PRIVATE LIMITED	BUY	737	506
BLEL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	465	505
BLEL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	465	505
BLEL	PLUTUS WEALTH MANAGEMENT LLP	BUY	310	505
BLEL	PLUTUS WEALTH MANAGEMENT LLP	SELL	310	505
BLEL	QE SECURITIES LLP	SELL	565	499
BLEL	QE SECURITIES LLP	BUY	566	497
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	BUY	51	272
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	SELL	228	273
COREIN	ATIVEER FINANCE CONSULTANTS LIMITED	BUY	256	78
COREIN	J.V.SHAH	BUY	254	78

Bulk Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price
COREIN	J.V.SHAH	BUY	254	78
COREIN	MANISH KIRITKUMAR SHAH (HUF)	BUY	147	79
COREIN	PJS SECURITIES LLP	BUY	269	78
COREIN	RIKHAV SECURITIES LIMITED	SELL	142	79
COREIN	SIDHACHAKRA ENTERPRISE LLP	BUY	173	78
COREIN	SUBRA TRADING PRIVATE LIMITED	BUY	230	78
COREIN	V.N.SHAH	BUY	254	78
DELTACORP	CLT RESEARCH TECH PRIVATE LTD	BUY	1464	85
DELTACORP	CLT RESEARCH TECH PRIVATE LTD	SELL	1464	85
DELTACORP	HRTI PRIVATE LIMITED	BUY	3323	84
DELTACORP	HRTI PRIVATE LIMITED	SELL	3457	84
DELTACORP	IMC INDIA SECURITIES PRIVATE LIMITED	SELL	1299	86
DELTACORP	IMC INDIA SECURITIES PRIVATE LIMITED	BUY	1559	85
DELTACORP	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	3152	85
DELTACORP	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	3157	85
DELTACORP	MICROCURVES TRADING PRIVATE LIMITED	SELL	5250	85
DELTACORP	MICROCURVES TRADING PRIVATE LIMITED	BUY	5250	85
DELTACORP	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	2196	85
DELTACORP	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	2196	85
DELTACORP	QE SECURITIES LLP	BUY	2673	85
DELTACORP	QE SECURITIES LLP	SELL	2700	85
DHTL	RAMESH JAIN HUF	BUY	60	26
DHTL	RAMESH KUMAR JAIN	SELL	65	26
DURLAX	ANCHAL BANSAL	BUY	164	66
DURLAX	ANCHAL BANSAL	SELL	164	67
DURLAX	HARSHIL HITESH DOSHI	BUY	752	67
DURLAX	HARSHIL HITESH DOSHI	SELL	842	66
DURLAX	HI GROWTH CORPORATE SERVICES PVT LTD	SELL	290	67
DURLAX	HI GROWTH CORPORATE SERVICES PVT LTD	BUY	294	66
EBGNG	BLEND FUND 2	BUY	888	675
EBGNG	UNIFI CAPITAL PRIVATE LIMITED	BUY	2012	675
EBGNG	VIDHI S KHANDELWAL	SELL	3420	675
ELEVATE	BOFA SECURITIES EUROPE SA	BUY	510	336
ELEVATE	BOFA SECURITIES EUROPE SA	SELL	1882	350
ELEVATE	GRT STRATEGIC VENTURES LLP	BUY	1238	330
ELEVATE	GRT STRATEGIC VENTURES LLP	SELL	1238	330
ELEVATE	IRAGE BROKING SERVICES LLP	SELL	1324	339
ELEVATE	IRAGE BROKING SERVICES LLP	BUY	1340	340
ELEVATE	NAVI FINSERV PRIVATE LIMITED	SELL	1357	355
ELEVATE	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1138	338
ELEVATE	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1138	338
ELEVATE	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	885	343
ELEVATE	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	885	339
GLASSWALL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	540	285
GLASSWALL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	552	283
GLASSWALL	PLUTUS WEALTH MANAGEMENT LLP	SELL	712	283
GLASSWALL	PLUTUS WEALTH MANAGEMENT LLP	BUY	712	283
HEROMOTORS	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	2531	148
HEROMOTORS	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	2531	147

Bulk Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price
HEROMOTORS	ARHAM SHARE PRIVATE LIMITED	BUY	610	153
HEROMOTORS	ARHAM SHARE PRIVATE LIMITED	SELL	2274	152
HEROMOTORS	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	3709	148
HEROMOTORS	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	3709	147
HEROMOTORS	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	SELL	2655	152
HEROMOTORS	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	BUY	2655	153
HEROMOTORS	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	2510	148
HEROMOTORS	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	2511	148
HEROMOTORS	PLUTUS WEALTH MANAGEMENT LLP	SELL	3489	146
HEROMOTORS	PLUTUS WEALTH MANAGEMENT LLP	BUY	3489	146
HEROMOTORS	QE SECURITIES LLP	BUY	1991	147
HEROMOTORS	QE SECURITIES LLP	SELL	2318	148
IEML	NIRAJ UMESH JOSHI	BUY	104	53
IRBINVIT	ARVESTA FINANCIAL SERVICES PRIVATE LIMITED	SELL	36508	63
IRBINVIT	L & T TECHNOLOGY SERVICES LIMITED	BUY	7957	63
IRBINVIT	L & T WELFARE COMPANY LIMITED	BUY	15887	63
IRBINVIT	L AND T EMPLOYEES WELFARE FOUNDATION PRIVATE L	BUY	15887	63
IRBINVIT	LTM LIMITED	BUY	15824	63
IRBINVIT	NEO TREASURY PLUS FUND	SELL	19048	63
KAPSTON	SRIKANTH KODALI	SELL	404	550
MAGSON	SERA INVESTMENTS & FINANCE INDIA LIMITED	SELL	114	180
MAGSON	UNICORN FUND	BUY	90	180
MARKOLINES	BASAN EQUITY BROKING LIMITED	SELL	114	169
MARKOLINES	GOLDENDUNES BUILDERS AND DEVELOPERS PRIVATE L	BUY	183	169
MARKOLINES	HI-KLASS TRADING AND INVESTMENT LIMITED	SELL	117	170
MARKOLINES	HI-KLASS TRADING AND INVESTMENT LIMITED	BUY	130	169
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	SELL	6375	18
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	BUY	9143	18
NDRINVIT	INVESTCORP INDIA WAREHOUSING IFSC TRUST	SELL	3400	148
NDRINVIT	SPARK FINANCIAL HOLDINGS PRIVATE LIMITED	BUY	3400	148
PKTEA	KIRAN VYAPAR LIMITED	BUY	19	1014
POOJALOGIS	NAVBHARAT INVESTMENT OPPORTUNITIES FUND	BUY	130	118
POOJALOGIS	PESB ALPHA FUND	SELL	185	119
POOJALOGIS	TRUSHALI VAIBHAV SHAH	BUY	90	118
PROZONER	APAX TRUST	BUY	1148	57
PROZONER	SARITA JAIN	BUY	20	56
PROZONER	SARITA JAIN	SELL	1025	57
QUESTLAB	YASHVI HITESH PATEL	BUY	101	98
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	BUY	1461	334
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	SELL	1461	334
RATNAVEER	HRTI PRIVATE LIMITED	BUY	202	335
RATNAVEER	HRTI PRIVATE LIMITED	SELL	433	331
RIR	BHAVNA HARSHAD MEHTA	SELL	1000	193
SBC	ACME CAPITAL MARKET LIMITED	BUY	2678	58
SBC	ACME CAPITAL MARKET LIMITED	SELL	2678	58
SBC	FINBRIDGE SECURITIES PRIVATE LIMITED	SELL	2721	58
SBC	HRTI PRIVATE LIMITED	SELL	2572	58
SBC	HRTI PRIVATE LIMITED	BUY	3972	58
SHIVAUM	ARIHANT CAPITAL MARKETS LIMITED	SELL	1	559
SHIVAUM	ARIHANT CAPITAL MARKETS LIMITED	BUY	111	545

Bulk Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price
SHIVAUM	TRADE CORNER	SELL	110	545
SSRETAIL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	562	744
SSRETAIL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	562	743
SSRETAIL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	577	739
SSRETAIL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	577	744
SSRETAIL	MICROCURVES TRADING PRIVATE LIMITED	BUY	373	744
SSRETAIL	MICROCURVES TRADING PRIVATE LIMITED	SELL	373	745
SSRETAIL	PLUTUS WEALTH MANAGEMENT LLP	BUY	778	743
SSRETAIL	PLUTUS WEALTH MANAGEMENT LLP	SELL	778	743
STLNETWORK	GOENKA SECURITIES PVT LTD	SELL	6118	52
SWASTIKAIN	ASHLAR SECURITIES PRIVATE LIMITED	BUY	200	200
SWASTIKAIN	NIVESH CONSULTANCY PRIVATE LIMITED	BUY	220	200
SWASTIKAIN	S S SECURITIES	BUY	200	210
SWASTIKAIN	VARADA TRADING PRIVATE LIMITED	BUY	175	200
SYNCOMF	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	5365	25
SYNCOMF	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	5365	25
SYNCOMF	HRTI PRIVATE LIMITED	BUY	4981	25
SYNCOMF	HRTI PRIVATE LIMITED	SELL	5513	25
SYNCOMF	QE SECURITIES LLP	SELL	5408	26
SYNCOMF	QE SECURITIES LLP	BUY	5615	25
TCIEXP	TCI TRADING	SELL	480	525
TCIEXP	XPS CARGO SERVICES LIMITED	BUY	480	525
TVSELECT	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	156	425
TVSELECT	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	156	424
ULTRAMAR	HIMALAYA INVESTMENT ADVISORS LLP	BUY	152	413
ULTRAMAR	SETU SECURITIES PVT LTD	SELL	150	414
ULTRAMAR	SWETABEN HARDIK SHAH	BUY	0	411
ULTRAMAR	SWETABEN HARDIK SHAH	SELL	185	415
VIJAYPD	BHAVNA HITESH PATEL	BUY	98	78
VISACHROME	ASSETS CARE AND RECONSTRUCTION ENTERPRISE LIM	SELL	1390	36
VISACHROME	MGO HIGH CONVICTION FUND INCORPORATED VCC SI	BUY	1389	36

Block Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price
EBGNG	BLEND FUND 2	BUY	888	674.8
EBGNG	UNIFI CAPITAL PRIVATE LIMITED	BUY	2,012	674.8
EBGNG	UNIFI CAPITAL PRIVATE LIMITED	BUY	520	674.8
EBGNG	VIDHI S KHANDELWAL	SELL	3,420	674.8
IRBINVIT	ARVESTA FINANCIAL SERVICES PRIVATE LIMITED	SELL	36,508	63.4
IRBINVIT	L & T TECHNOLOGY SERVICES LIMITED	BUY	7,957	63.2
IRBINVIT	L & T WELFARE COMPANY LIMITED	BUY	15,887	63.4
IRBINVIT	L AND T EMPLOYEES WELFARE FOUNDATION PVT LTD	BUY	15,887	63.4
IRBINVIT	LTM LIMITED	BUY	15,824	63.2
IRBINVIT	NEO TREASURY PLUS FUND	SELL	19,048	63.2
NDRINVIT	INVESTCORP INDIA WAREHOUSING IFSC TRUST	SELL	3,400	148.0
NDRINVIT	SPARK FINANCIAL HOLDINGS PRIVATE LIMITED	BUY	3,400	148.0
TCIEXP	TCI TRADING	SELL	480	525.0
TCIEXP	XPS CARGO SERVICES LIMITED	BUY	480	525.0

Global Macro Events

Event	Previous	Forecast
USA		
Fed Goolsbee Speech		
Fed Kashkari Speech		
Challenger Job Cuts SEP	52.881K	78.0K
Initial Jobless Claims SEP/26	197K	195.0K
Continuing Jobless Claims SEP/19	1719K	1720.0K
Jobless Claims 4-week Average SEP/26	202.25K	199.0K
Fed Barkin Speech		
Fed Collins Speech		
Fed Schmid Speech		
S&P Global Manufacturing PMI Final SEP	53.9	57.0
ISM Manufacturing PMI SEP	54.6	54.7
ISM Manufacturing Employment SEP	51.2	51.5
Construction Spending MoM AUG	-0.50%	-0.30%
ISM Manufacturing New Orders SEP	53.7	53.9
ISM Manufacturing Prices SEP	71.1	71.3
EIA Natural Gas Stocks Change SEP/25	53Bcf	
4-Week Bill Auction	3.85%	
8-Week Bill Auction	3.99%	
15-Year Mortgage Rate OCT/01	6.42%	
30-Year Mortgage Rate OCT/01	7.03%	
India		
HSBC Manufacturing PMI Final SEP	52.8	55.7
Japan		
Tankan Large Manufacturers Index Q3	22	23
BoJ Summary of Opinions	¥1082.9B	
Foreign Bond Investment SEP/19		
Foreign Bond Investment SEP/26		
Stock Investment by Foreigners SEP/26	¥-1522.8B	
Stock Investment by Foreigners SEP/19	11.50%	5.00%
Tankan Large All Industry Capex Q3	17	18
Tankan Large Manufacturing Outlook Q3	37	35
Tankan Large Non-Manufacturing Index Q3	28	23
Tankan Non-Manufacturing Outlook Q3	9	10
Tankan Small Manufacturers Index Q3	54.9	55.2
S&P Global Manufacturing PMI Final SEP		
Germany		
S&P Global Manufacturing PMI Final SEP	54.3	53.8
Great Britain		
Nationwide Housing Prices MoM SEP	0.20%	0.10%
Nationwide Housing Prices YoY SEP	1.60%	1.50%
S&P Global Manufacturing PMI Final SEP	51.7	52.0
BoE Mann Speech		
BoE Mills Speech		

Nifty & Bank Spot – Pivot Levels 01/10/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	22620.45	22540	22460	22326	22754	22888	22968
Bank Nifty	54633.05	54160	53686	53198	55120	55608	56081

Syrma SGS Technology Ltd – Technical Stock Call – 01/10/2026

Technical Stock Call	Action	CMP	Target	Support	SL
SYRMA	BUY	1782.90	2340	(1726-1678)-1644-(1610-1564)	1502



Sector: Electronics Manufacturing (INEODYJ01015)

About: Syрма SGS Technology Ltd. is an Indian **Electronics System Design & Manufacturing (ESDM/EMS)** company providing design, engineering, manufacturing and testing solutions for electronic products. Its customers span **Automotive & EV, Healthcare/MedTech, Industrial, Consumer, IT, Railways, Telecom and Defence.**

View – Medium Term Bullish

The primary up move in the stock commenced from 1418 (Sep 26). After which it started trading above its key moving averages and gradually strengthened, rallying to a high of 1803.90 (Sep 26).

Thereafter, the stock entered a narrow consolidation phase during Sep 26 & traded sideways. During this phase, it attempted to sustain above the previous high but faced resistance and failed to surpass it, marking a high of 1781.90 (Sep 26).

Recently, the stock started forming higher bottoms, indicating improving buying interest at lower levels. Subsequently, it delivered an **Ascending Triangle Breakout** on the daily chart, supported by volumes, with a bullish candle reaching 1820 (Sep 26) above the previous swing tops.

The breakout above the consolidation range indicates renewed upward momentum, while sustained volumes and higher-bottom formation further strengthen the positive price structure.

Indicators like MACD, KST & PVT suggests positive crossover.

The stock is trading above 200 SMA. The 200 SMA is in rising mode.

Target of **2340** is expected with lower support levels at **(1726-1678)-1644-(1610-1564)** in case of intermediate fall.

A stop loss at **1502** is to be followed for the trade.

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

Borosil Ltd – Technical Stock Call – 01/10/2026

Technical Stock Call	Action	CMP	Target	Support	SL
BOROLTD	BUY	293.38	390	(283-274)-268-(263-254)	244



Sector: Consumer Durables / Specialty Products (INE02PY01013)

About: Borosil Ltd. is an Indian consumer and scientific-products company with businesses spanning **consumer glassware, kitchen & lifestyle products, and laboratory/scientific products**. The company was separated from the solar-glass business in the 2020 restructuring; **Borosil Renewables** operates the solar-glass business separately.

View – Medium Term Bullish

The stock commenced its downtrend from 397.95 (SEP 25).

Forming Lower tops, the stock started trading below the 200 SMA & gradually reached a low of 214.50 (MAR 26).

Later, the stock entered into a consolidation phase & after taking support at 215.06 (MAY 26), further the stock rallied upwards marking a high of 289 (AUG 26). Thereafter, the stock attracted buying interest at lower levels & commenced its up move & recently, after forming higher bottoms, the stock has given a **Descending Triangle – Bullish Breakout** on the weekly chart supported by volumes with a bullish candle reaching to a high of 300 (SEP 26), which is higher than the previous swing highs.

Upwards price breakout from a descending triangle is usually a bullish reversal, suggesting sellers are losing control against strong buyer's demand.

Indicators like MACD, KST & AROON suggests positive crossover.

Target of **390** is expected with lower support levels at **(283-274)-268-(263-254)** in case of intermediate fall.

A stop loss at **244** is to be followed for the trade.

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

Stock specific news

RoDTEP Extension Supports Exports

The government extended the RoDTEP scheme to 31 December 2026, with existing refund rates and value caps unchanged. The extension preserves reimbursement of embedded taxes and duties for exporters and avoids a policy gap at the start of Q3 FY27. This is relevant for textiles, engineering goods, chemicals, pharma and other export-oriented sectors. The Economic Times Source

West Asia Export Cover Extended

Enhanced export-credit insurance protection for shipments to West Asia has been extended to 31 March 2027. The measure protects exporters against buyer-payment defaults amid elevated geopolitical and shipping risks, reducing working-capital and receivable risks for India's exporters. The Economic Times Source

Modi-Trump Trade Talks Resume

Prime Minister Narendra Modi and Donald Trump discussed trade, defence, energy and critical technologies on 30 September, while India's commerce minister continued negotiations in Washington. The renewed engagement is important for tariff-sensitive exporters and could influence the near-term outlook for India-US trade relations. Reuters Source

Renewable Programme Gets ₹1.86 Lakh Cr

The Cabinet approved ₹1,86,405 crore for Green Energy Corridor Phase-III, including ₹1,36,378 crore for intra-state transmission and ₹50,000 crore for 50 GWh of battery storage. The programme is designed to evacuate up to 135 GW of renewable power by FY33, creating a large multi-year transmission and storage opportunity. Press Information Bureau Source

Battery Storage Push Accelerates

The new green-energy programme earmarks ₹50,000 crore for 50 GWh of BESS, addressing renewable intermittency, congestion and non-solar-hour demand. The policy materially expands the addressable market for battery-storage developers, equipment suppliers and grid-flexibility infrastructure. Press Information Bureau Source

CAFE Norms Tighten From FY28

New Corporate Average Fuel Economy norms will apply from 1 April 2027 to March 2032, tightening the fuel-consumption benchmark from 3.996 litres/100 km to 3.3273 litres/100 km. The roughly 16.7% efficiency improvement will push automakers towards EVs, hybrids, lighter vehicles and more fuel-efficient powertrains. Press Information Bureau Source

Rabi MSP Package Approved

The Cabinet raised MSPs for all mandated Rabi crops for marketing season 2027-28, with the largest absolute increase of ₹675/quintal for safflower and ₹413 for rapeseed-mustard. Higher support prices could improve farm income but also influence food inflation and government procurement requirements. Press Information Bureau Source

Pulse Procurement Gets ₹5,548 Cr

The government approved ₹5,547.99 crore of MSP procurement for pulses and oilseeds in Uttar Pradesh, Karnataka and Telangana, covering 7.06 lakh tonnes. The intervention is aimed at protecting farmer realisations and stabilising prices following weather-related supply concerns. Press Information Bureau Source

Coastal Mission Gets ₹767 Cr

National Coastal Mission 2.0 was launched with a ₹767 crore central-sector outlay through 2030-31 across nine coastal states and four UTs. The programme targets coastal resilience and blue-economy development, with implications for coastal infrastructure, ports and marine ecosystems. Press Information Bureau Source

South Korea Pledges \$200 Bn US Investment

President Trump unveiled plans for around \$200 billion of South Korean investment in US projects, including energy-related assets. The agreement highlights the continuing redirection of Asian industrial capital towards US manufacturing and infrastructure amid tariff and supply-chain realignment. Reuters Source

Delhi Traffic Capex Approved

The Cabinet approved ₹1,789.52 crore for an AI-enabled Intelligent Traffic Management System covering 42 Delhi corridors over 24 months. The project includes adaptive signals, technology-based enforcement and real-time traffic information, adding to the urban technology and infrastructure pipeline. Press Information Bureau Source

Petroleum Law Faces Overhaul

The government released the draft Petroleum (Amendment) Bill 2026 for public consultation, with comments invited until 30 October. The legislation could reshape the regulatory framework governing petroleum activities, making it relevant for exploration, refining, fuel marketing and energy-investment decisions. Press Information Bureau Source

FPI Onboarding To Go Digital

SEBI and RBI are working to make foreign portfolio investor onboarding faster and fully digital, with certain jurisdictions already testing onboarding within five working days. The regulators are also streamlining KYC and developing exchange-listed bond indices, potentially lowering friction for foreign capital entering Indian markets. Business Standard Source

Scrap Import Rules Under Review

India has not yet decided whether to replace overseas pre-shipment certification for metal scrap with inspection at Indian ports. India imports around 13 million tonnes of recyclable metal scrap annually, so any change could affect recycling economics, import logistics and domestic secondary-metal supply. Reuters Source

Sugar Stocks Hit Decade Low

Opening sugar stocks for the 2026-27 season fell to just 3.75 million tonnes, a more than decade-low level. With production estimates also pressured by weather, the government may extend the export restriction, keeping domestic sugar availability and prices under policy watch. The Financial Express Source

Monsoon Ends 12.6% Deficit

India ended the June-September monsoon season with rainfall 12.6% below average, the weakest monsoon in more than a decade. The deficit raises risks around crop yields, rural incomes, food inflation, reservoir levels and agricultural demand entering FY27's second half. Reuters Source

Saudi Investment Protection Improves

India approved a new investment protection pact with Saudi Arabia that reduces the local-remedy period before international arbitration to two years from five. Saudi Arabia's sovereign wealth fund has indicated potential investment of up to \$100 billion in India, making the agreement relevant for infrastructure and long-term FDI. The Financial Express Source

India-UAE Local Trade Expands

India and the UAE are pushing wider use of rupee-dirham settlements and payment-system integration to reduce friction in bilateral trade. Greater local-currency settlement could lower dollar dependence in trade flows and support financial connectivity between the two economies. The Economic Times Source

Qatar Pushes \$10 Bn Investment

India and Qatar discussed wider UPI adoption, finalising the bilateral investment treaty and converting Qatar's \$10 billion investment commitment into actual investments. Progress could improve capital flows into Indian infrastructure, financial services and strategic sectors. Moneycontrol Source

Power Shortage Hits 7.7 GW

September power demand rose 14.5% YoY to a 269 GW peak, while an evening shortage reached 7.7 GW on 9 September. Coal stocks have fallen to around eight days and nearly 40% of thermal plants have critically low reserves, highlighting rising requirements for storage and dispatchable generation. The Financial Express Source

Trump Weighs Diesel Export Ban

Donald Trump said the US is still considering a 90-day diesel export ban as domestic fuel prices remain elevated. Such a move could tighten global middle-distillate supply, particularly affecting Europe and potentially increasing competition for diesel cargoes from India. Reuters Source

Europe May Release Diesel Reserves

The US is pressing Europe to release emergency diesel inventories as fuel markets tighten. Germany and France together hold roughly 35% of the EU's 39 million-tonne strategic diesel reserves, making any coordinated release relevant for global diesel and refining spreads. Reuters Source

Russia Extends Diesel Export Ban

Russia extended its diesel export restrictions for fuel producers through end-October. Continued restrictions add to global middle-distillate tightness and are relevant for Indian refiners and exporters competing for alternative crude and product flows. The New Voice of Ukraine Source

BOJ Opens Door To Faster Hikes

The Bank of Japan signalled that rate increases could occur faster and more regularly, with its policy rate currently at 1.25% and markets watching potential October or December action. A faster BOJ tightening cycle can influence yen carry trades and global capital flows into emerging markets. Reuters Source

Australia Inflation Reaccelerates

Australian inflation accelerated in August as fuel costs surged and broader price pressures remained persistent. The data increases pressure on the Reserve Bank of Australia and adds to the global theme of energy-driven inflation, relevant for commodity and Asia-Pacific rate expectations. Reuters Source

Euro Zone Inflation Jumps

Euro-zone inflation accelerated sharply in September, driven partly by higher energy prices, increasing pressure on the ECB to reconsider its rate path. Higher European rates and bond yields can tighten global financial conditions and affect emerging-market allocations. Reuters Source

Germany Inflation Hits Three-Year High

German inflation reached its highest level since December 2023, while unemployment rose more than expected in September. The combination of higher prices and weaker labour-market conditions complicates the ECB outlook and could keep European yields volatile. Reuters Source

DeepSeek Challenges Nvidia Ecosystem

DeepSeek and Huawei announced open-source programming tools for Huawei's Ascend AI chips, aiming to reduce reliance on Nvidia's CUDA software ecosystem. The development could accelerate China's domestic AI-chip adoption and influence global semiconductor and AI-infrastructure supply chains. Reuters Source

US Senate Blocks Data-Centre Bill

The US Senate blocked legislation requiring regulators to consider whether large data centres should bear the cost of electricity-grid upgrades they create. The decision removes an immediate regulatory hurdle for US AI infrastructure expansion and supports continued data-centre power investment. Reuters Source

US Energy Permitting Deal Advances

US senators reached a bipartisan agreement to reform energy-project permitting, with a vote expected after the November midterms. Faster approvals could accelerate investment in power, pipelines and energy infrastructure, influencing global LNG, equipment and commodity markets. Reuters Source

Macro / Non-Stock News

Nifty Ends September Lower

Nifty 50 fell 0.42% to 22,620.45 on 30 September, while Sensex declined 0.07% to 72,480.29, extending the losing streak to three sessions. Banking, PSU Bank, Realty and Media gained, while Pharma and Metal declined over 1%. September ended with Nifty down 6.1%, its second consecutive monthly fall. Reuters Reuters market report

FII Selling Hits ₹10,148 Cr

FIIs sold ₹10,148 crore of Indian equities on 30 September, their largest single-day outflow in nearly six months. DIIs bought ₹11,272 crore, providing a domestic liquidity cushion. September FII selling reached about ₹44,013 crore, while DIIs remained net buyers throughout all 21 sessions. Moneycontrol Moneycontrol FII-DII update

Nifty Holds 22,500 Support

Nifty closed at 22,620, with immediate support placed at 22,550–22,500 and a break potentially exposing the April low near 22,200. Resistance is around 22,800–23,000. The technical setup remains weak, with RSI at 25.27 and 101 F&O stocks showing fresh short build-up. Moneycontrol Moneycontrol October 1 trade setup

PCR Falls, Shorts Increase

Nifty PCR declined to 0.79 from 0.91, while India VIX rose 0.58% to 13.49. Maximum Call writing was concentrated at 22,900, followed by 22,700 and 23,000. Fresh short build-up was seen in 101 stocks, versus 49 with long build-up, pointing to continued defensive F&O positioning. Moneycontrol Moneycontrol F&O setup

Rupee Remains Near ₹96

The rupee closed around ₹95.98/\$ after touching a two-month low of ₹96.1475 earlier in the week. It declined 0.7% in September and 1.2% in Q2 FY27, with crude, global yields and foreign outflows remaining key pressures. RBI intervention has prevented a retest of the ₹96.96 record low. Reuters Reuters rupee update

RBI Forward Book Hits \$200bn

RBI's net forward dollar liabilities reached a record \$200 billion in August, up \$63 billion MoM. Policy-induced dollar inflows reached \$143.5 billion between June 8 and September 18, lifting FX reserves to a record \$785.7 billion. Subsequent FX swaps have absorbed an estimated \$20 billion of excess rupee liquidity. Reuters Reuters RBI FX update

Bond Yields Stay Elevated

India's 10-year G-sec yield eased to around 7.148%, but government bonds ended the quarter at their weakest levels in more than two years. Rising crude, global yields and expectations of RBI tightening remain the key drivers. The RBI's October 5–7 meeting is therefore critical for the domestic rates market. Moneycontrol Moneycontrol bond-market update

RBI Hike Expectations Rise

A Reuters economist poll showed 35 of 61 economists expecting a 25-bp RBI hike to 5.50% at the October 5–7 meeting, which would be the first increase since February 2023. August CPI had risen to 4.82%, above the RBI's 4% target for a third month. The Economic Times Economic Times RBI outlook

Brent Ends September Higher

Brent November futures settled at \$103.50/bbl, up 0.9% on 30 September, while WTI settled at \$90.42/bbl. Brent gained roughly 14% during September, as stalled US-Iran negotiations and tight fuel markets maintained the geopolitical premium. For India, elevated crude remains a direct risk to inflation, CAD and INR. Reuters Reuters oil market update

Gold Faces Yield Pressure

Spot gold fell 0.7% to \$4,152.86/oz on 30 September and was heading for a 6.6% monthly decline. Cooler US inflation reduced immediate Fed-hike expectations, but high Treasury yields and elevated energy prices continued to pressure bullion. October Fed-hike probability fell to around 39%. Reuters Reuters gold update

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