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Daily Updates

Market Commentary

Overnight global action:

On 23rd September 2026, US markets ended lower, with the S&P 500 declining by 58.3 pts (-0.75%), Dow Jones falling by 352.1 pts (-0.68%) and Nasdaq 100 declining by 262.1 pts (-0.85%). Gift Nifty gained 2.5 pts (+0.01%), indicating a flat opening for Indian markets.

NSE breadth turned positive with 2,324 advances against 1,224 declines, while BSE witnessed 2,752 advances versus 1,655 declines.

Index Options Data Analysis:

Nifty OI peaks at 24,000 Calls and 23,000 Puts. PCR stands at 1.09.
Sensex OI peaks at 76,000 Calls and 73,000 Puts. PCR stands at 1.23.
Bank Nifty Call and Put OI both peak at 57,500 — heavy ATM congestion zone. PCR stands at 1.04.

Securities in Ban for F&O Trade:

KAYNES, LICHSGFIN, MANAPPURAM, SAIL

Sector Performance:

NIFTY MICROCAP 250 index grew by 1.29 % driven by OPTIEMUS(+17.20%), PGIL(+9.62%), LLOYDSENGG(+6.88%)

NIFTY SMALLCAP 50 index grew by 0.99 % driven by WOCKPHARMA(+6.75%), FIVESTAR(+4.41%), BANDHANBNK(+3.62%)

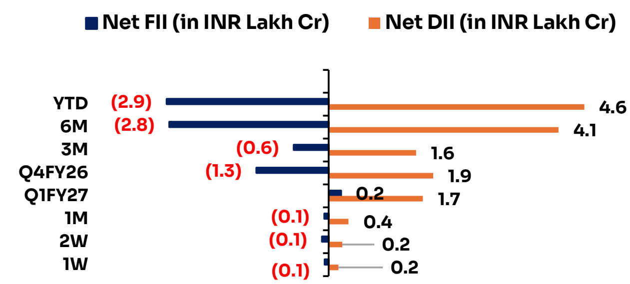
NIFTY SMALLCAP 100 index grew by 0.96 % driven by WHIRLPOOL(+20.00%), OLAELEC(+10.69%), WOCKPHARMA(+6.75%)

NIFTY MIDCAP SELECT index grew by 0.19 % dragged by SUZLON(-1.42%), LUPIN(-1.51%), SWIGGY(-1.95%)

NIFTY 50 index grew by 0.5 % dragged by HCLTECH(-1.08%), TITAN(-0.98%), INFY(-0.86%)

NIFTY MIDCAP 50 index grew by 0.57 % dragged by PERSISTENT(-2.35%), PAYTM(-2.17%), SWIGGY(-1.95%)

Fund Flow - 24th Sep 2026	Buy	Sell	Net
FII/FPI (INR Cr)	13,580.4	11,963.0	1,617.5
DII (INR Cr)	14,404.9	12,063.4	2,341.5



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	23,318	0.01%	-11.20%	21.1
Sensex 30	74,828	0.40%	-12.19%	19.6
Nifty 50	23,447	0.50%	-10.27%	21.3
India VIX	10	-5.73%	9.42%	
Nifty Bank	56,549	0.59%	-5.09%	16.6
Nifty Next 50	72,462	0.92%	4.47%	72.5
Nifty 500	22,935	0.62%	-3.92%	21.5
Nifty Mid 100	62,396	0.70%	3.16%	32.1
Nifty Small 250	18,411	0.83%	10.35%	31.0
USD/INR	94.5	0.00%	5.04%	
India 10Y	7.0%			
India 2Y	6.4%			
India 1Y	5.7%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,706	-0.75%	12.58%	33.4
Dow Jones	51,512	-0.68%	7.17%	24.9
Nasdaq 100	30,470	-0.85%	20.68%	50.0
FTSE 100	10,705	-0.03%	7.79%	16.9
CAC 40	8,123	-0.39%	-0.32%	23.8
DAX	25,411	-0.66%	3.76%	26.5
Nikkei 225	66,233	1.87%	31.50%	35.3
Hang Seng	24,834	-1.01%	-3.11%	12.1
Shanghai Comp	3,937	-0.39%	-0.81%	17.8
KOSPI	7,081	0.90%	68.03%	35.1
S&P/ASX 200	8,653	-1.28%	-0.67%	22.8

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Stocks in the News

VIKRAN ENGINEERING (CMP: 56, MARKET CAP: 1447 Cr., SECTOR: EPC / POWER TRANSMISSION)

NSE Filing

Received a ₹153.76 crore order from Power Grid Corporation of India (POWERGRID).The order relates to a 400 kV AIS Extension Substation Package SS-136T.The project strengthens Vikran's transmission EPC order pipeline and execution visibility. (Screener)

WEBSOL ENERGY SYSTEM (CMP: 74, MARKET CAP: 3206 Cr., SECTOR: SOLAR CELLS & MODULES)

NSE Filing

West Bengal Government allotted land to Websol for a proposed 4 GW solar cell and module manufacturing facility.The expansion supports the company's backward integration strategy in solar manufacturing.The announcement relates to land allocation; project investment and commissioning timeline were not disclosed in the available summary. (Screener)

GMR AIRPORTS (CMP: 99, MARKET CAP: 104682 Cr., SECTOR: AIRPORTS / INFRASTRUCTURE)

NSE Filing

Subsidiary GMR Hospitality Limited received an award related to airport hospitality operations.The disclosure was made under receipt of award/orders/contracts category on 23 September.The available filing summary does not provide contract value or tenure. (Screener)

LENSKART SOLUTIONS (CMP: 686, MARKET CAP: 119386 Cr., SECTOR: CONSUMER RETAIL / EYEWEAR)

NSE Filing

Acquired an additional stake in Le Petit Lunetier Paris SAS, France, through its subsidiary NESO Brands Pte. Ltd. Singapore.The acquisition expands Lenskart's international eyewear portfolio.The filing relates to an incremental stake purchase; transaction value was not available in the filing summary. (Screener)

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	27,158	0.26%	-3.66%	22.4
Nifty IT	28,334	-0.87%	-25.21%	22.1
Nifty Fin Ser	25,565	0.58%	-7.42%	16.7
Nifty Pharma	27,152	0.90%	19.49%	44.7
Nifty Services	30,064	0.31%	-10.67%	33.1
Nifty Cons Dur	38,200	0.63%	3.93%	51.8
Nifty PSE	9,638	0.22%	-2.19%	10.1
Nifty FMCG	46,259	1.32%	-16.61%	31.9
Nifty Pvt Bank	27,363	0.28%	-4.73%	10.2
Nifty PSU Bank	8,365	1.14%	-1.97%	13.7
Nifty Cons	11,546	0.51%	-6.05%	40.8
Nifty Energy	37,760	0.09%	6.89%	12.0
Nifty Health	16,868	0.89%	15.22%	40.4
Nifty India Mfg	16,017	0.80%	3.92%	29.8
Nifty Metal	13,302	2.40%	19.12%	23.8
Nifty Oil & Gas	11,005	0.42%	-10.02%	16.9

Derivatives Position (Combined)

Stock	% Chg OI	%Chg LTP
Long		
POLICYBZR	17.3	4.9
BANDHANBNK	16.8	3.7
360ONE	15.2	3.6
SONACOMS	12.9	3.3
MOTILALOFS	6.9	3.5
Short		
ATHERENERG	13.7	-2.4
INOXWIND	8.0	-3.6
ICICIPRULI	6.7	-0.8
MPHASIS	6.5	-0.6
SUZLON	5.9	-1.8
Long Unwinding		
SOLARINDS	-2.9	-1.5
TECHM	-2.5	0.0
KAYNES	-1.9	-1.7
MANKIND	-1.8	-0.5
COALINDIA	-1.2	-0.9
Short Covering		
KEI	-5.6	2.8
SAIL	-3.4	5.5
RECLTD	-2.5	1.2
PATANJALI	-2.3	1.6
GMRAIRPORT	-2.3	0.7

Daily Updates

QUALITY POWER ELECTRICAL EQUIPMENTS (CMP: 1492, MARKET CAP: 11552 Cr., SECTOR: POWER EQUIPMENT / ENERGY TRANSITION)

NSE Filing

Board meeting outcome disclosed consideration of equity issuance through preferential allotment/QIP route.The company operates in high-voltage electrical equipment and energy-transition solutions.The announcement indicates a potential capital-raising exercise; issue size and pricing were not disclosed in the available summary. (Screener)

Commodities	CMP	1D	YTD
Gold ($)	4,476	0.11%	3.67%
Silver ($)	66.8	-0.10%	-7.6%

Currency	CMP	1D	YTD
USD/INR	94.5	0.00%	5.04%
EUR/INR	109.9	-0.09%	4.04%
GBP/INR	127.8	-0.11%	5.57%
JPY/INR	0.6	0.06%	5.87%
EUR/USD	1.2	0.01%	-1.04%

Securities Lending & Borrowing Scheme

Company	Under.Ltp	Fut.Ltp	Spread (%)
KAYNES	3,458.00	3,310.00	4.28
BAJAJHLDNG	11,449.00	11,313.00	1.19
KFINTECH	911.95	904.55	0.81
OBEROIRLTY	1,850.00	1,836.30	0.74
PIIND	2,386.00	2,370.10	0.67

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
DIVISLAB	9,624	9,624	9,615	9-Sep-26
APOLLOHOSP	9,069	9,071	9,050	4-Aug-26
LAURUSLABS	2,034	2,037	2,033	22-Sep-26
WELCORP	2,797	2,836	2,829	22-Sep-26
IKS	1,928	1,970	1,933	10-Jul-26

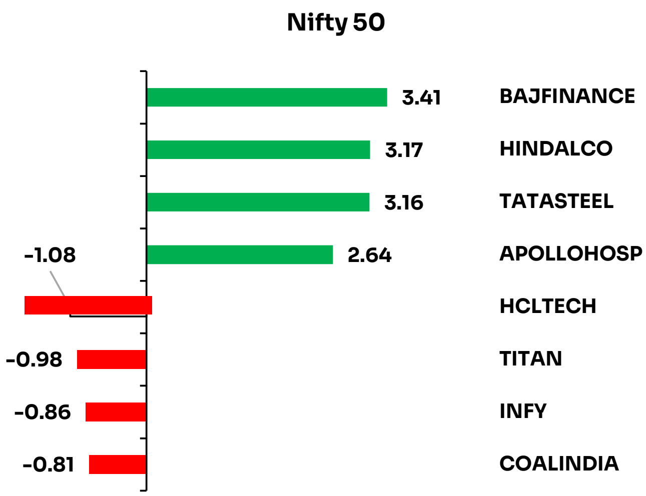
52 Week Low

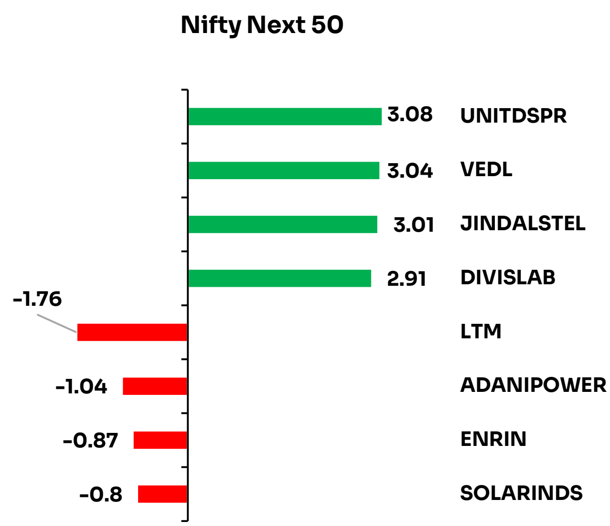
Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
BRITANNIA	4,929	4,905	4,915	22-Sep-26
VOLTAS	1,130	1,091	1,100	22-Sep-26
TVSHLTD	12,588	12,361	12,376	16-Sep-26
PGHH	7,190	7,170	7,200	22-Sep-26
IRB	18	18	18	22-Sep-26

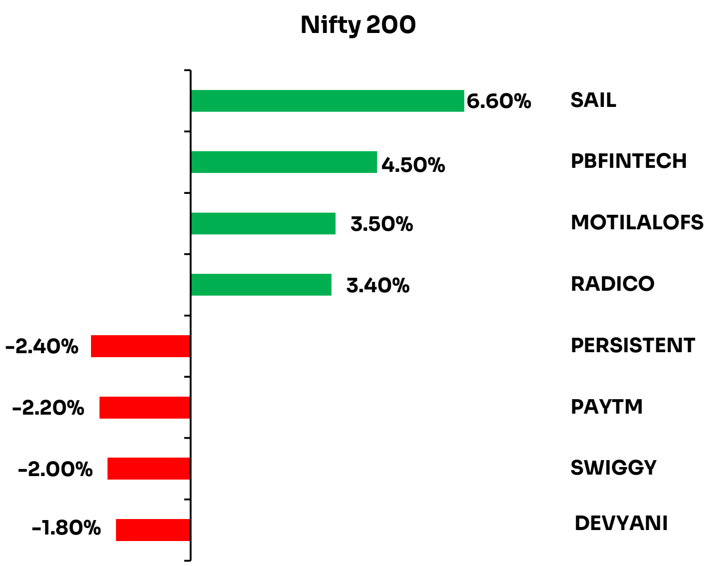
Volume Shockers

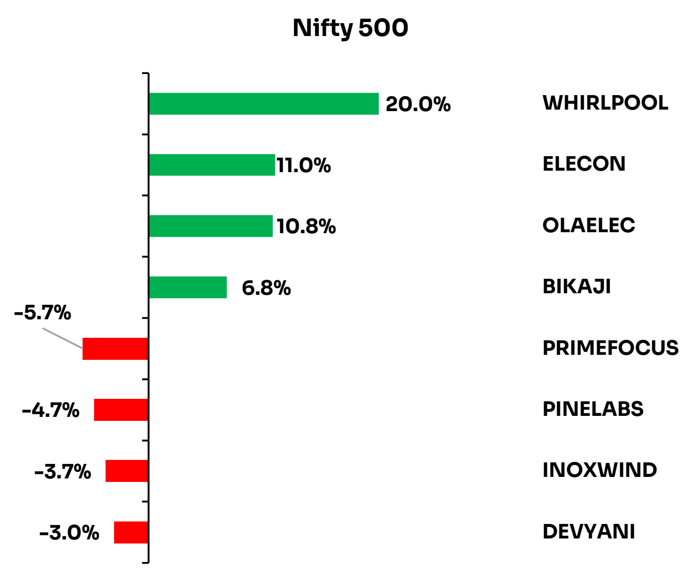
Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
LOYALTEX	52	0	0	235
EKC	23,855	122	117	114
ELECON	30,987	195	207	466
SBIETFPB	1,541	10	7	279
TEXINFRA	15,603	146	283	123
SAB	2	0	0	170
NPBET	14	0	1	284
ARVSMART	6,651	105	84	628
MOOILGAS	445	11	11	11
BIKAJI	4,379	119	145	593
MOLOWVOL	736	21	20	35
RADAAN	567	17	18	3
PREMIERPOL	6,517	212	207	97
MUKANDLTD	2,525	87	118	158
ANSALBU	180	8	5	101
WHIRLPOOL	10,753	471	373	865
SOLEX	1,119	50	38	731
FRONTSP	354	16	14	1,395
KOTHARIPRO	133	7	6	70
MARINE	19,064	1,022	839	429
SILVER001	550	30	49	23
NIFTYAXIS	222	12	139	261
SCODATUBES	2,931	163	150	139
ATLASCYCLE	240	17	147	100
RAYMONDREL	12,802	903	790	669

Top Gainers & Losers









Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
AASTHA	JAGID VANITABEN RAJENDRAPRASAD	SELL	257	89
AASTHA	JAGID VANITABEN RAJENDRAPRASAD	BUY	468	88
AASTHA	L7 HITECH PRIVATE LIMITED	SELL	304	90
AASTHA	L7 HITECH PRIVATE LIMITED	BUY	405	89
AGIIL	ARIHANT CAPITAL MARKETS LIMITED	SELL	2969	272
AGIIL	ARIHANT CAPITAL MARKETS LIMITED	BUY	3027	272
AGIIL	INFINITE DERIVATIVES LLP	SELL	1300	273
AGIIL	THAKKAR NILESHKUMAR FARSHURAM HUF	BUY	400	272
AGIIL	THAKKAR NILESHKUMAR FARSHURAM HUF	SELL	1100	271
AHCL	HRTI PRIVATE LIMITED	BUY	13195	29
AHCL	HRTI PRIVATE LIMITED	SELL	13277	29
AHCL	IRAGE BROKING SERVICES LLP	BUY	2017	29
AHCL	IRAGE BROKING SERVICES LLP	SELL	2875	29
AHCL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	4996	29
AHCL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	4996	29
AHCL	MICROCURVES TRADING PRIVATE LIMITED	SELL	2897	29
AHCL	MICROCURVES TRADING PRIVATE LIMITED	BUY	2897	29
AHCL	QE SECURITIES LLP	BUY	5328	29
AHCL	QE SECURITIES LLP	SELL	5329	29
AMBANIORGO	DEEPAK MANSUKHLAL DOSHI	SELL	44	112
AMBANIORGO	PJS SECURITIES LLP	BUY	44	112
ANANTAM	NUVAMA WEALTH FINANCE LIMITED	BUY	1185	106
ARIHANTCAP	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	669	97
ARIHANTCAP	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	669	97
ARVSMART	MICROCURVES TRADING PRIVATE LIMITED	SELL	295	650
ARVSMART	MICROCURVES TRADING PRIVATE LIMITED	BUY	295	649
ARVSMART	QE SECURITIES LLP	SELL	226	648
ARVSMART	QE SECURITIES LLP	BUY	234	645
ATALREAL	HRTI PRIVATE LIMITED	BUY	1023	14
ATALREAL	HRTI PRIVATE LIMITED	SELL	1162	14
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	SELL	850	14
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	BUY	1087	14
ATALREAL	L7 HITECH PRIVATE LIMITED	BUY	293	14
ATALREAL	L7 HITECH PRIVATE LIMITED	SELL	819	14
ATALREAL	QE SECURITIES LLP	BUY	804	14
ATALREAL	QE SECURITIES LLP	SELL	811	14
AUSTENG	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	24	173
AUSTENG	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	24	172
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	SELL	269	302
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	BUY	288	301
CUBEXTUB	INDRA KIRAN VENTURES	SELL	75	126
CUBEXTUB	LAROIA MONA	BUY	392	126
DHARIWAL	SAILESH MUSADDI	BUY	489	24
DHTL	GOUTHAMCHANDSIMPAL	BUY	10	26
DHTL	GOUTHAMCHANDSIMPAL	SELL	25	26
DUGLOBAL	RADIANT GLOBAL FUND-CLASS B PARTICIPATING SHARE	SELL	928	19
EKC	J4S FINANCIAL SOLUTIONS LLP	SELL	586	115
EKC	J4S FINANCIAL SOLUTIONS LLP	BUY	586	114
EKC	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1396	114
EKC	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1396	114

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Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
EKC	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1396	114
EKC	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	837	114
EKC	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	837	114
EKC	VINSUL MAKARDI LTD	BUY	614	115
EKC	VINSUL MAKARDI LTD	SELL	614	115
ELECON	MICROCURVES TRADING PRIVATE LIMITED	SELL	1254	463
ELECON	MICROCURVES TRADING PRIVATE LIMITED	BUY	1254	463
FEDDERSHOL	BULLPULSE MARKETEDGE PRIVATE LIMITED	SELL	1025	65
FEDDERSHOL	BULLPULSE MARKETEDGE PRIVATE LIMITED	BUY	1025	65
FEDDERSHOL	HJS SECURITIES PRIVATE LIMITED	SELL	1066	66
FEDDERSHOL	HJS SECURITIES PRIVATE LIMITED	BUY	1101	66
FEDDERSHOL	HRTI PRIVATE LIMITED	BUY	1449	66
FEDDERSHOL	HRTI PRIVATE LIMITED	SELL	1602	66
FEDDERSHOL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1171	66
FEDDERSHOL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1171	66
FEDDERSHOL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1191	66
FEDDERSHOL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1191	66
FEDDERSHOL	PLASTOMATIC PACKAGING PRIVATE LIMITED	SELL	2559	66
FEDDERSHOL	PLASTOMATIC PACKAGING PRIVATE LIMITED	BUY	3137	66
FEDDERSHOL	QE SECURITIES LLP	SELL	1439	66
FEDDERSHOL	QE SECURITIES LLP	BUY	1443	66
FEDDERSHOL	VISTAAR TRADING SERVICE PRIVATE LIMITED	SELL	1163	65
FEDDERSHOL	VISTAAR TRADING SERVICE PRIVATE LIMITED	BUY	1163	65
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	SELL	88	645
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	BUY	123	644
GLASSWALL	D3 STOCK VISION LLP	BUY	455	281
GLASSWALL	D3 STOCK VISION LLP	SELL	475	283
GLASSWALL	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	SELL	676	302
GLASSWALL	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	BUY	684	301
GLASSWALL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	715	301
GLASSWALL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	723	300
GLASSWALL	IRAGE BROKING SERVICES LLP	BUY	707	303
GLASSWALL	IRAGE BROKING SERVICES LLP	SELL	968	293
GLASSWALL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	2567	300
GLASSWALL	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	2570	289
GLASSWALL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	757	298
GLASSWALL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	757	298
GLASSWALL	MICROCURVES TRADING PRIVATE LIMITED	BUY	620	296
GLASSWALL	MICROCURVES TRADING PRIVATE LIMITED	SELL	620	296
GLASSWALL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	797	299
GLASSWALL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	797	299
GLASSWALL	PLUTUS RESEARCH PRIVATE LIMITED	BUY	489	291
GLASSWALL	PLUTUS RESEARCH PRIVATE LIMITED	SELL	502	291
GLASSWALL	PLUTUS WEALTH MANAGEMENT LLP	BUY	2013	302
GLASSWALL	PLUTUS WEALTH MANAGEMENT LLP	SELL	2013	302
GLASSWALL	QE SECURITIES LLP	BUY	675	295
GLASSWALL	QE SECURITIES LLP	SELL	681	302
GNA	SEEHRA MANINDER SINGH	SELL	584	563
GSMFOILS	HI GROWTH CORPORATE SERVICES PVT LTD	SELL	83	79

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
GSMFOILS	HI GROWTH CORPORATE SERVICES PVT LTD	BUY	90	78
GUJTHEM	L7 HITECH PRIVATE LIMITED	BUY	0	413
GUJTHEM	L7 HITECH PRIVATE LIMITED	SELL	653	411
HEROMOTORS	BLITZQUANT RESEARCH LLP	BUY	2582	89
HEROMOTORS	BLITZQUANT RESEARCH LLP	SELL	2582	89
HEROMOTORS	GRT STRATEGIC VENTURES LLP	BUY	4700	92
HEROMOTORS	GRT STRATEGIC VENTURES LLP	SELL	4704	92
HEROMOTORS	IRAGE BROKING SERVICES LLP	BUY	5275	91
HEROMOTORS	IRAGE BROKING SERVICES LLP	SELL	6598	92
HEROMOTORS	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	6364	91
HEROMOTORS	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	6368	91
HEROMOTORS	PURE BROKING PRIVATE LIMITED	SELL	3098	90
HEROMOTORS	PURE BROKING PRIVATE LIMITED	BUY	3100	90
HEROMOTORS	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	3064	92
HEROMOTORS	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	4064	94
JALAN	KRISHAN KUMAR	BUY	504	2
JALAN	MANISH JALAN	SELL	504	2
JSIPL	ANUBHAV PODDAR	BUY	525	120
JSIPL	INTELICORP BUSINESS CONSULTANTS	BUY	315	120
JSIPL	KESHAV CASTING PRIVATE LIMITED	BUY	300	120
JSIPL	NEOMILE GROWTH FUND - SERIES I	BUY	700	120
KANOHAR	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	419	901
KANOHAR	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	419	901
KANOHAR	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	410	914
KANOHAR	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	410	900
KANOHAR	PLUTUS WEALTH MANAGEMENT LLP	BUY	620	902
KANOHAR	PLUTUS WEALTH MANAGEMENT LLP	SELL	620	903
KLL	VICCO TRADING CORPORATION	SELL	233	42
KROSS	HRTI PRIVATE LIMITED	BUY	322	274
KROSS	HRTI PRIVATE LIMITED	SELL	323	274
KROSS	QE SECURITIES LLP	BUY	370	274
KROSS	QE SECURITIES LLP	SELL	372	274
KSHITIJPOL	SATISH MEJIYATAR	BUY	1522	5
KSHITIJPOL	SATISH MEJIYATAR	SELL	2649	5
LAMOSAIC	ARYAMAN CAPITAL MARKETS LIMITED	SELL	60	51
LAMOSAIC	ESCORP ASSET MANAGEMENT LIMITED	SELL	60	51
LAMOSAIC	MIZAN SHAKEEL MISTRY	BUY	77	51
LAMOSAIC	VIRALI VICKY JHAVERI	SELL	64	50
MAGSON	ORVANTA CORPORATION LLP	BUY	110	180
MAGSON	RAJESH EMMANUEL FRANCIS	SELL	258	180
MAGSON	RISING CORPORATION LLP	BUY	97	180
MANIKA	BHARAT VALUE FUND-SERIES III	BUY	899	42
MANIKA	EQUISM CAPITAL PRIVATE LIMITED	BUY	600	42
MANINDS	HRTI PRIVATE LIMITED	SELL	427	954
MANINDS	HRTI PRIVATE LIMITED	BUY	443	952
MANUGRAPH	BHARAT KUNVERJI KENIA	SELL	192	24
MANUGRAPH	INDRA KIRAN VENTURES	SELL	90	24
MANUGRAPH	INDRA KIRAN VENTURES	BUY	206	24
MANUGRAPH	LUNA INVESTMENTS	BUY	250	23
MANUGRAPH	NIMISH LAXMICHAND KENIA	SELL	175	24

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
MANUGRAPH	SHIVAM OMAR	SELL	162	24
MANUGRAPH	SHIVAM OMAR	BUY	165	23
MARINE	KDU ENTERPRISES PRIVATE LIMITED	SELL	4200	386
MARINE	QE SECURITIES LLP	SELL	713	420
MARINE	QE SECURITIES LLP	BUY	713	414
MARINE	SBI FUNDS MANAGEMENT LIMITED	BUY	1155	395
MARINE	SETU SECURITIES PVT LTD	BUY	974	387
MARINE	SETU SECURITIES PVT LTD	SELL	974	399
MARINE	SWETABEN HARDIK SHAH	BUY	747	385
MARINE	SWETABEN HARDIK SHAH	SELL	747	392
MAZDA	CROLL REYNOLDS INTERNATIONAL INC	SELL	133	254
MOS	ASHOK INVESTORS TRUST LIMITED	SELL	5988	7
MOS	L7 HITECH PRIVATE LIMITED	BUY	3500	7
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	BUY	18451	18
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	SELL	19303	18
MOTISONS	L7 HITECH PRIVATE LIMITED	BUY	1865	18
MOTISONS	L7 HITECH PRIVATE LIMITED	SELL	12880	19
MOTISONS	TRADEXA NOVA PRIVATE LIMITED	BUY	15135	19
OLAELEC	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	26337	41
OLAELEC	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	26337	41
OPTIEMUS	BANK OF INDIA MUTUAL FUND	BUY	1769	816
PCJEWELLER	HRTI PRIVATE LIMITED	SELL	40889	14
PCJEWELLER	HRTI PRIVATE LIMITED	BUY	55589	14
PCJEWELLER	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	85619	14
PCJEWELLER	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	85619	14
PRIORITY	ASTRALIT INVESTMENTS PRIVATE LIMITED	BUY	90	259
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	BUY	2035	331
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	SELL	2065	331
RATNAVEER	BLOOMCREST TRADE PRIVATE LIMITED	SELL	500	330
RATNAVEER	JAINAM BROKING LIMITED	SELL	502	330
RATNAVEER	THAKKAR NILESHKUMAR FARSHURAM HUF	BUY	450	330
RAYMOND	HRTI PRIVATE LIMITED	BUY	432	1109
RAYMOND	HRTI PRIVATE LIMITED	SELL	471	1110
RAYMOND	QE SECURITIES LLP	SELL	378	1108
RAYMOND	QE SECURITIES LLP	BUY	379	1108
RAYMONDREL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	501	662
RAYMONDREL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	501	663
RAYMONDREL	HRTI PRIVATE LIMITED	SELL	288	662
RAYMONDREL	HRTI PRIVATE LIMITED	BUY	407	656
RAYMONDREL	MICROCURVES TRADING PRIVATE LIMITED	BUY	838	666
RAYMONDREL	MICROCURVES TRADING PRIVATE LIMITED	SELL	838	666
RCDL-RE	MANN ALPESH VORA	BUY	303	4
RCDL-RE	RAJGOR JAGRUTIBEN PARESHKUMAR	SELL	249	4
RCDL-RE	VALISH ALPESH VORA	BUY	162	4
RFBL	L7 HITECH PRIVATE LIMITED	SELL	234	98
SHANTIGOLD	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	518	284
SHANTIGOLD	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	518	284
SHANTIGOLD	HRTI PRIVATE LIMITED	SELL	374	279
SHANTIGOLD	HRTI PRIVATE LIMITED	BUY	460	279
SHANTIGOLD	MICROCURVES TRADING PRIVATE LIMITED	BUY	412	287
SHANTIGOLD	MICROCURVES TRADING PRIVATE LIMITED	SELL	412	287

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Daily Updates

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
SHANTIGOLD	PRAVEEN KUMAR REDDY ANIPIREDDY VENKATA	BUY	524	279
SHANTIGOLD	QE SECURITIES LLP	BUY	569	280
SHANTIGOLD	QE SECURITIES LLP	SELL	590	280
SOLEX	KAMALKISHORE BANSILAL CHANDAK	SELL	60	750
SSRETAIL	BLITZQUANT RESEARCH LLP	BUY	880	672
SSRETAIL	BLITZQUANT RESEARCH LLP	SELL	880	672
SSRETAIL	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	SELL	451	682
SSRETAIL	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	BUY	472	683
SSRETAIL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	407	677
SSRETAIL	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	429	682
SSRETAIL	GOLDMINE STOCKS PRIVATE LIMITED	BUY	604	676
SSRETAIL	GOLDMINE STOCKS PRIVATE LIMITED	SELL	604	677
SSRETAIL	GRT STRATEGIC VENTURES LLP	SELL	1394	669
SSRETAIL	GRT STRATEGIC VENTURES LLP	BUY	1395	668
SSRETAIL	IRAGE BROKING SERVICES LLP	BUY	1660	683
SSRETAIL	IRAGE BROKING SERVICES LLP	SELL	1173	666
SSRETAIL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	635	675
SSRETAIL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	653	678
SSRETAIL	MARWADI CHANDARANA INTERMEDIARIES BROKERS PR	SELL	385	655
SSRETAIL	MARWADI CHANDARANA INTERMEDIARIES BROKERS PR	BUY	410	659
SSRETAIL	MICROCURVES TRADING PRIVATE LIMITED	BUY	741	687
SSRETAIL	MICROCURVES TRADING PRIVATE LIMITED	SELL	741	688
SSRETAIL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	2300	669
SSRETAIL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	2302	669
SSRETAIL	PATRONUS TRADETECH LLP	SELL	613	678
SSRETAIL	PATRONUS TRADETECH LLP	BUY	649	680
SSRETAIL	PURE BROKING PRIVATE LIMITED	SELL	1081	672
SSRETAIL	PURE BROKING PRIVATE LIMITED	BUY	1099	673
SSRETAIL	SANJAY POPATLAL JAIN	SELL	75	733
SSRETAIL	SANJAY POPATLAL JAIN	BUY	375	639
SSRETAIL	SILVER LINE VENTURES PRIVATE LIMITED	SELL	379	675
SSRETAIL	SILVER LINE VENTURES PRIVATE LIMITED	BUY	429	680
SSRETAIL	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	1111	696
SSRETAIL	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	1111	690
SUBEXLTD	QE SECURITIES LLP	BUY	2693	22
SUBEXLTD	QE SECURITIES LLP	SELL	2944	22
TECHNOCRAF	QE SECURITIES LLP	SELL	228	474
TECHNOCRAF	QE SECURITIES LLP	BUY	229	476
TEXINFRA	ZUARI INDUSTRIES LIMITED	BUY	12811	115
TEXINFRA	ZUARI INTERNATIONAL LIMITED	SELL	12811	115
TICL	MACE VENTURE	BUY	5500	6
TICL	MONET SECURITIES PRIVATE LTD	BUY	5500	6
TICL	NADIA SECURITY PRINTING & STATIONERY CO PVT LTD	SELL	1000	6
TICL	RAVI TODI	SELL	9000	6
TICL	RAVI TODI HUF	SELL	1000	6
TICL	UPENDRA SINGH CONSTRUCTIONS PRIVATE LIMITED	SELL	906	6
TRUALT	SIDDHISURI FINVEST PRIVATE LIMITED	BUY	473	420
UNIDT	CAIRN OIL SOLUTIONS PRIVATE LIMITED	SELL	103	235
WELSPUNLIV	FIDELITY SECURITIES FUND FIDELITY BLUE CHIP GROWTH	BUY	12988	215
WELSPUNLIV	WELSPUN GROUP MASTER TRUST	SELL	24471	215
WESTLIFE	ADMAS INDUSTRIES PRIVATE LIMITED	BUY	890	600

Daily Updates

Block Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
TEXINFRA	ZUARI INDUSTRIES LIMITED	BUY	12,811	115.02
TEXINFRA	ZUARI INTERNATIONAL LIMITED	SELL	12,811	115.02
WELSPUNLIV	FIDELITY INVESTMENT TRUST FIDELITY INTERNATIONAL SMALL CAP FUND	BUY	22,242	214.90
WELSPUNLIV	QUANT MUTUAL FUND	BUY	2,229	214.90
WELSPUNLIV	WELSPUN GROUP MASTER TRUST	SELL	24,471	214.90

Global Macro Events

Event	Previous	Forecast
USA		
Fed Williams Speech		
Fed Barkin Speech		
Current Account Q2	$-226.8B	$-249.0B
Initial Jobless Claims SEP/19	196K	201K
Building Permits Final AUG	1.433M	1.394M
Building Permits MoM Final AUG	4.30%	-2.70%
Continuing Jobless Claims SEP/12	1730K	1735K
Jobless Claims 4-week Average SEP/19	203.25K	203.00K
Fed Hammack Speech		
NY Fed Bill Purchases 4 to 12 months		
New Home Sales AUG	0.607M	0.626M
New Home Sales MoM AUG	-10.50%	3.20%
Fed Paulson Speech		
EIA Natural Gas Stocks Change SEP/18	44Bcf	
Kansas Fed Composite Index SEP	10	5
Kansas Fed Manufacturing Index SEP	17	9
4-Week Bill Auction	3.82%	
8-Week Bill Auction	3.92%	
15-Year Mortgage Rate SEP/24	6.26%	
30-Year Mortgage Rate SEP/24	6.95%	
7-Year Note Auction	4.51%	
President Trump and President Xi Summit		
UN General Assembly		
Japan		
S&P Global Manufacturing PMI Flash SEP	54.9	55.2
S&P Global Services PMI Flash SEP	52.5	52.7
S&P Global Composite PMI Flash SEP	53.5	54.0
Germany		
Ifo Business Climate SEP	88.8	89.0
Ifo Current Conditions SEP	88.5	88.9
Ifo Expectations SEP	89.1	88.7
Great Britain		
BoE Bean Speech		
BoE Dhingra Speech		
CBI Distributive Trades SEP	-48	-49
BoE Breeden Speech		
India		

Daily Updates

Nifty & Bank Spot – Pivot Levels 24/09/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	23446.80	23374	23303	23257	23491	23537	23608
Bank Nifty	56548.90	56297	56046	55883	56711	56874	57125

Texmaco Rail & Engineering Ltd – Technical Stock Call – 24/09/2026

Technical Stock Call	Action	Reco	Target	Support	SL
TEXRAIL	BUY	124.75	165	(120-116)-(111-107)	102

Sector: Capital Goods - Railways & Engineering (INE621L01012)

About: **Texmaco Rail & Engineering Ltd.** is one of India's leading railway rolling stock and rail infrastructure companies, engaged in manufacturing freight wagons, metro & railway components, steel castings, bridges, and rail EPC projects. Founded in 1939 and headquartered in Kolkata, it is the flagship railway engineering company of the Adventz Group.

View – Short Term Bullish

The stock commenced its downtrend from 142.60 (DEC 25).

Stock breached 200 SMA & thereafter, traded below the averages marking a low of 78.05 (MAR 26).

Later, buying emerged & the stock commenced its up move reaching a high of 130.75 (MAY 26), but faced resistance in that area & entered into a consolidation zone. However, the stock traded into a narrow range between 130.75 - 102.10 during the period MAY 26_AUG 26, seeking trend direction.

Recently, after forming higher bottoms the stock has given a **Symmetrical Triangle Breakout** supported by volume reaching to a high of 126.65 (SEP 26), which is higher than the previous swing highs of 123.90 (SEP 26).

MACD, KST, RSI & Aroon indicators suggest Positive crossover.

Target of **165** is expected with lower support levels at **(120-116)-(111-107)** in case of intermediate fall.

A stop loss at **102** is to be followed for the trade.
All the calls/opinions are subject to Disclosures and Disclaimer http://goo.gl/8bCMyQ

Daily Updates

Greaves Cotton Ltd – Technical Stock Call – 24/09/2026

Technical Stock Call	Action	Reco	Target	Support	SL
GREAVESCOT	BUY	206.01	260	(200-195)-(188-184)	178

Sector: Capital Goods - Engineering & Mobility Solutions (INE224A01026)

About: **Greaves Cotton Ltd.** is a diversified engineering and mobility solutions company with over 165 years of legacy, manufacturing engines, electric vehicles, powertrain solutions, aftermarket products, and industrial equipment. Headquartered in Mumbai, the company is transforming from a traditional diesel-engine business into a fuel-agnostic mobility and clean energy player.

View – Short Term Bullish

The stock commenced its downtrend from 271.90 (JUL 26).

Forming Lower tops, stock started trading below the averages & gradually reached a low of 194.50 (AUG 26).

Later, buying emerged at lower levels & further the stock entered into a consolidation zone trading between the range 194.50 – 178.71 during the period AUG 26_SEP 26, trading around the averages seeking trend direction.

Recently, after forming higher bottoms the stock has given a **Falling Wedge – Reversal Breakout** supported by volume reaching to a high of 209.19 (SEP 26), which is higher than the previous swing highs.

MACD, TSI, RSI & Aroon indicators suggest Positive crossover. The stock is trading above 200 SMA.

Target of **260** is expected with lower support levels at **(200-195)-(188-184)** in case of intermediate fall.

A stop loss at **178** is to be followed for the trade.

Stock specific news

OLED tariff probe begins
India initiated an investigation into alleged tariff evasion by major electronics manufacturers over imported OLED TV display components. Authorities are examining whether premium display parts were incorrectly classified under lower-duty categories, potentially impacting import costs and pricing strategies in the consumer electronics sector. (Reuters)

Electronics duty scrutiny rises
The OLED component investigation highlights India's increasing focus on import classification and domestic manufacturing protection. Any revision in duty structures could impact electronics assemblers, component suppliers and companies dependent on imported high-value technology parts. (Reuters)

Russia oil sanction risk grows
US legislative discussions around additional sanctions on Russia increased concerns for countries importing Russian crude. Any restriction affecting Russian oil flows could impact India's discounted crude sourcing strategy, refinery margins and import costs. (Reuters)

Russian crude dependency watched
Markets continued monitoring India's exposure to Russian oil amid potential geopolitical restrictions. Any reduction in discounted supplies could increase crude procurement costs and pressure refiners' profitability. (Reuters)

Steel export access improves
India secured wider access for steel exports under the EU trade framework, allowing additional export volumes while exporters continue facing carbon-related costs. The development improves long-term competitiveness for domestic steel producers. (Reuters)

EU carbon cost remains
While Indian steel exporters gain additional EU market access, carbon-related charges remain a key factor affecting export economics. Steel companies continue assessing the impact of carbon border measures on margins. (Reuters)

RBI liquidity tightening continues
RBI reduced excess banking-system liquidity through bond sales, FX operations and liquidity management measures. The central bank’s actions reduced surplus liquidity significantly, impacting short-term money market conditions and rate expectations. (Reuters)

Banking liquidity surplus falls
Banking system liquidity surplus declined sharply after RBI interventions, reducing excess cash available with lenders. The change could influence short-term rates, bond yields and banking-sector liquidity conditions. (Reuters)

RBI bond sales increase
RBI continued selling government bonds to absorb excess liquidity from the banking system. Higher bond supply absorption measures remain important for sovereign yields and financial-sector positioning. (Reuters)

Market awaits policy clarity
Investors remain focused on upcoming policy developments around trade, energy and liquidity as these factors influence sector rotation and valuations.

Rupee support remains priority
RBI intervention remained a key factor limiting rupee volatility as traders monitored crude prices and foreign flows. Currency stability remains important for imported inflation and foreign investor sentiment. (Reuters)

Foreign inflow outlook improves
Portfolio-related inflows provided support to the rupee despite global uncertainty. Markets continued tracking foreign investment trends after recent equity outflows. (Reuters)

India energy security focus
Discussions around Russian crude restrictions increased focus on India's energy diversification strategy. Any disruption in sourcing could impact fuel prices, inflation expectations and energy-importing industries. (Reuters)

Critical mineral supply focus
Global policy discussions continued around securing critical mineral supply chains amid geopolitical competition. The development remains relevant for EV, renewable energy and electronics manufacturing sectors.

Trade policy uncertainty rises
Global markets continued monitoring tariff-related developments as countries reassess supply chains amid changing trade policies. Export-oriented sectors remain sensitive to changes in market access and duties.

India manufacturing protection
Recent duty investigations highlight India's increasing focus on protecting domestic manufacturing while balancing import costs. Electronics, metals and industrial sectors remain key beneficiaries of supportive trade measures.

Global supply chain shifts
Companies continue adjusting supply chains amid tariff uncertainty and geopolitical risks. India remains a potential beneficiary as manufacturers diversify production locations.

Energy import risks monitored
Potential restrictions on Russian energy flows remain a key risk for import-dependent economies. India’s crude sourcing strategy remains important for inflation and external balance.

RBI policy trade-off increases
RBI faces a balance between managing liquidity surplus and maintaining growth-supportive financial conditions. Liquidity operations remain a key driver for bond and banking markets.

Bond market positioning changes
RBI liquidity absorption measures influenced investor expectations around bond yields. Market participants continued assessing the impact on government securities and rate-sensitive sectors.

Financial conditions tighten
Reduction in excess liquidity indicates gradual tightening of financial conditions compared with earlier surplus periods. The shift is relevant for banks, NBFCs and money markets.

Electronics manufacturing risk rises
Duty investigations on imported components highlight potential cost pressures for electronics manufacturers relying on overseas supply chains. Companies may need to reassess sourcing strategies.

Steel exporters gain visibility
Improved EU market access provides additional export opportunities for Indian steel producers. However, carbon-related costs remain an important profitability factor.

EU trade opportunity expands
Additional steel export access under trade arrangements improves market visibility for Indian producers targeting European demand.

Commodity supply chains adjust
Geopolitical developments continue forcing commodity-intensive industries to reassess sourcing and inventory strategies. Metals, energy and manufacturing sectors remain sensitive.

US trade restrictions monitored
Markets continued tracking potential US policy actions affecting global trade flows. Any expansion of restrictions could impact emerging-market exporters.

India export competitiveness focus
Government initiatives around trade access and manufacturing protection remain important for improving India's export competitiveness across industrial sectors.

Currency risk management rises
Businesses with imported inputs continue monitoring rupee movement as RBI manages volatility through market operations.

Industrial policy support continues
Government focus on domestic manufacturing and supply-chain resilience remains supportive for strategic sectors including electronics, metals and energy.

Global policy uncertainty persists
Investors continued monitoring geopolitical and trade-policy changes as key drivers for emerging-market sentiment and capital allocation.

Macro / Non-Stock News

Markets Recover On Metals
Indian equities rebounded on 23 September after the previous session's decline. Sensex gained 299 points (+0.40%) to 74,828, while Nifty rose 117.8 points (+0.50%) to 23,446.8. Metals and financials led the recovery, with Tata Steel and Bajaj Finance among major contributors. Easing crude prices and softer global yields improved risk appetite. (The Financial Express)

DII Support Offsets FII Flows
Foreign investors turned net buyers on 23 September, with FIIs purchasing equities worth ₹13,580.4 crore and selling ₹11,963.0 crore, resulting in a net inflow of ₹1,617.5 crore. DIIs remained strong buyers, with purchases of ₹14,404.9 crore against sales of ₹12,063.4 crore, leading to a net inflow of ₹2,341.5 crore. Sustained domestic institutional support and renewed FII buying provided stability to Indian equities amid global market volatility.

Nifty Holds 23,300 Base
Nifty recovered above 23,400 after defending the 23,300 support zone. Derivatives data showed maximum Call OI concentrated at 23,500 strike (1.02 crore contracts), while Put OI remained highest at 23,000 strike (1.26 crore contracts). Immediate resistance remains at 23,500–23,600, while support is seen near 23,300–23,000. (Moneycontrol)

PCR Improves Sentiment
Nifty Put-Call Ratio increased to 1.03 from 0.94, indicating higher Put writing and improving short-term sentiment. India VIX declined sharply to 10.34 (-5.93%), its lowest closing level since January 2026, reflecting reduced near-term volatility. (Moneycontrol)

Crude Slips Below $100
Brent crude remained below the critical $100/bbl mark as supply concerns eased and markets assessed improving Middle-East supply conditions. Lower crude prices are positive for India's inflation outlook, current account balance, INR stability and sectors such as aviation, paints and OMCs. (Reuters)

US Tech Rally Continues
US markets ended higher, led by technology stocks. Nasdaq touched a record high, rising around 0.40% to 27,231.59, supported by AI-related optimism and strong technology spending expectations. Positive US tech cues could support Indian IT sentiment, although domestic IT stocks remain sensitive to global demand concerns. (Reuters)

US Yields Ease Slightly
US Treasury yields softened as crude prices moderated, though markets continued pricing a higher-for-longer Fed stance. Lower yields provided some valuation relief to global equities, but elevated rates remain a risk for emerging-market flows. (Reuters)

Gold Faces Rate Pressure
Gold prices declined as investors continued adjusting to expectations of prolonged higher interest rates. Spot gold fell around 0.4% to $4,325/oz, while markets continued tracking Fed commentary on inflation and future rate decisions. (Reuters)

China Trade Talks Key Trigger
US-China discussions on tariffs, artificial intelligence and critical minerals remained a major global market focus. Any improvement in trade relations could support Asian equities and industrial commodities, while renewed tariff tensions remain a risk for global supply chains. (Reuters)

Global Inflation Risk Persists
Despite softer crude prices, global central banks remain cautious as energy costs and geopolitical tensions continue influencing inflation expectations. The Fed and other major central banks are maintaining a restrictive stance, keeping global liquidity conditions tight for emerging markets including India. (Reuters)

Daily Updates

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