

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	72,480.29	72,192.89	72,572.90	71,292.88	71,909.70	-570.59	-0.79
NIFTY	22,620.45	22,543.70	22,610.60	22,217.30	22,421.95	-198.50	-0.88

INDICES ENDED THE DAY ON A LOWER NOTE

The 30-share BSE Sensex was down by 570.59 points or 0.79% to settle at 72,909.70 and the Nifty was down by 198.50 points or 0.88% to settle at 22,421.95. The BSE Small Cap 250 was down by 1.23% and BSE 500 was down by 0.99%. On the sectoral front, IT were the gaining index while Capital Goods remains flat. On the flip side, Oil & Gas, Banks, Auto, Realty, Healthcare, Metal, FMCG, and Consumer Durables were the losing indices. Infosys, TCS, HCL Tech, Hdfc Bank and Kotak Bank were the top gainers on the Sensex; on the flip side, Maruti, M&M, Tata Steel, Adani Ports, and ITC were the top losers on the Sensex. On global front, Asian markets shut the day on a negative note and European indices are trading on a green note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,035.0	994.10	4.11
HDFCLIFE	534.20	521.20	2.49
HDFCBANK	721.20	708.70	1.76
SBILIFE	1,721.6	1,696.4	1.49
MAXHEALTH	940.95	929.80	1.20

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BAJAJ-AUTO	10,045.0	10,874	-7.62
MARUTI	11,386.0	11,967	-4.86
SHRIRAMFIN	945.00	982.70	-3.84
TATASTEEL	178.00	184.30	-3.42
ADANI PORTS	1,737.8	1,798.3	-3.36

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
KOTAKBANK	76637247	418.35	3,271.2
HDFCBANK	37389857	721.20	2,679.0
RELIANCE	16771221	1,167.7	1,967.4
BSE	6273089	3,046.0	1,918.1
ICICIBANK	13163495	1,310.6	1,735.2

Most Active (by volume)

Name	Qty	Pr.	Value CR
KOTAKBANK	76637247	418.35	3,271.2
TATASTEEL	47659952	178.00	858.98
HDFCBANK	37389857	721.20	2,679.0
ETERNAL	29716584	313.90	932.80
JIOFIN	28082023	212.50	596.13



Indian equity markets remained under pressure on Thursday, extending their losses for the fourth consecutive session, as traders remained cautious amid ongoing concerns over developments in West Asia, fears of higher interest rates, and sustained selling by foreign investors in recent sessions.

Crisil expects the Reserve Bank of India (RBI) to raise the policy rate by 25 basis points each in October and December. However, Joshi said the rate hikes are unlikely to hurt private capital investment significantly, as corporates are sitting on large cash reserves and have deleveraged balance sheets. He added that the RBI is likely to continue using various tools to manage excess liquidity in the financial system.

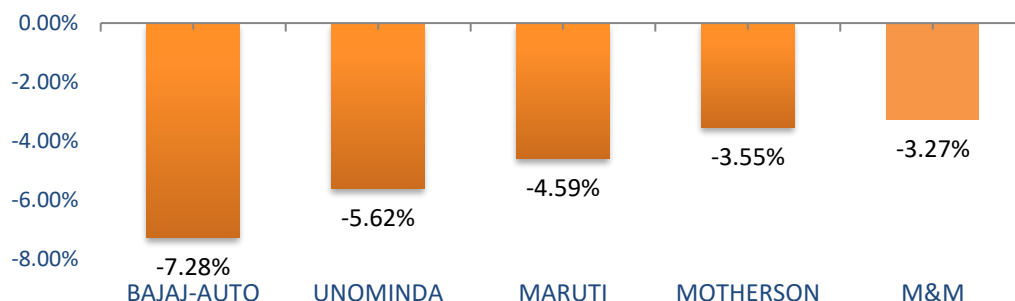
On the global front: European stocks were trading in red, weighed down by persistent inflation concerns, rising oil prices, and elevated bond yields. Asian markets closed mixed following the mixed cues from Wall Street overnight.

Source- AceEquity

NEWS BULLETIN

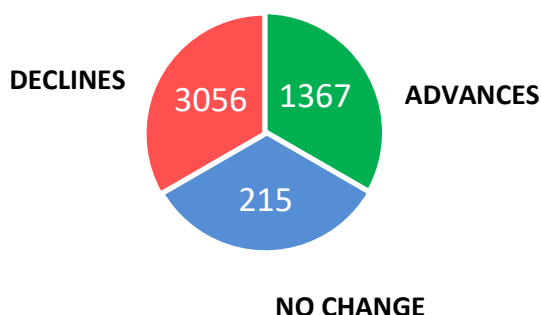
- **Mahindra & Mahindra (M&M)** has reported a 14.53% rise in its overall auto sales at 1,14,874 units for the month of September 2026, as compared to 1,00,298 units in the same month last year.
- **Waaree Energies** wholly owned subsidiary- Waaree Power has commenced commercial production of its new solar inverter manufacturing line, having an annual installed capacity of 1.10 GW, at its factory situated at Sarodhi, Valsad, Gujarat.
- **Tech Mahindra** has entered into partnership with Infinite Uptime, the Production Outcomes Partner for Heavy Industries, to accelerate the adoption of Physical AI across manufacturing and process industries

MARKET DRIVING SECTOR : AUTO

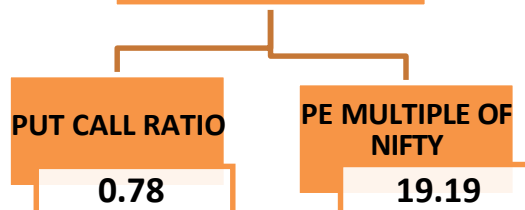


S&P BSE: AUTO
CLOSING: 56,364.06
CHANGE: -1,797.53
CHANGE: -3.09%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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