

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,693.71	83,108.92	83,141.21	82,704.92	83,013.96	+ 320.25	+ 0.39
NIFTY	25,330.25	25,441.05	25,448.95	25,329.75	25,423.60	+ 93.35	+ 0.37

## BOURSES ENDED HIGHER FOR THE 3<sup>RD</sup> STRAIGHT SESSION

The 30-share BSE Sensex was up by 320.25 points or 0.39% to settle at 83,013.96 and the Nifty was up by 93.35 points or 0.37% to settle at 25,423.60. The BSE Mid-Cap was up by 0.36% and BSE Small Cap was down by 0.01%. On the sectoral front, Healthcare, Auto, Banks, IT, FMCG, Metal and Oil & Gas were gaining indices; on the flip side, Capital Goods, Realty and Consumer Durables were losing indices. Eternal, Sunpharma, Infosys, HDFC Bank and HCL Tech were the top gainers on the Sensex; on the flip side, Tata Motors, Trent, Bajaj Finance, Asian Paint and Ultratech Cement were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
ETERNAL	337.85	328.25	2.92
HDFCLIFE	785.10	768.05	2.22
SUNPHARMA	1,648.50	1,620.20	1.75
CIPLA	1,580.00	1,559.60	1.31
INFY	1,541.10	1,522.40	1.23

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
COALINDIA	393.00	399.75	-1.69
BAJFINANCE	994.10	1,007.50	-1.33
TRENT	5,149.00	5,197.50	-0.93
TATAMOTORS	712.50	719.15	-0.92
TATACONSUM	1,128.50	1,136.30	-0.69

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,77,91,598	976.00	1,734.08
INFY	93,31,945	1,541.10	1,441.90
RELIANCE	93,32,642	1,415.00	1,320.86
ETERNAL	3,65,75,258	337.85	1,222.42
ICICIBANK	81,30,537	1,423.00	1,156.55

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ETERNAL	3,65,75,258	337.85	1,222.4
HDFCBANK	1,77,91,598	976.00	1,734.0
POWERGRID	1,68,42,964	289.60	485.01
TATASTEEL	1,64,13,388	172.09	281.31
ITC	1,56,47,808	412.50	643.92



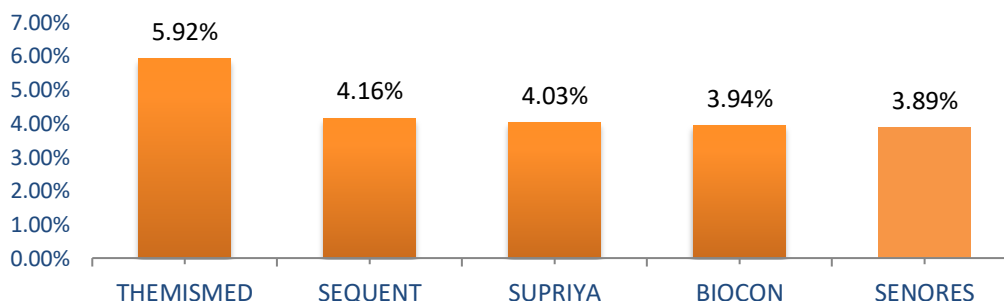
Indian equity benchmarks continued their winning momentum on Thursday, with both the Nifty and Sensex closing with significant gains, amid optimism over ongoing U.S.-India trade talks. Markets made a gap-opening, buoyed by gains in IT stocks after the U.S. Federal Reserve cut the benchmark lending rate by 25 basis points to a range of 4.00-4.25 percent and signaled two additional cuts in 2025. In last leg of trade, markets gave up most of their intraday gains, but managed to close higher. Some support came as Union Commerce Minister Piyush Goyal stated that relations between India and the US remain positive as leaders of both countries are friends, and asserted that every situation will be addressed satisfactorily. Sentiments remained optimistic as the rating agency Crisil has indicated that the CAD of India is likely to remain under control at 1% of GDP in the current FY26, despite of the challenges faced by the economy from higher tariffs and global geopolitical headwinds. Traders took some support as Union Commerce Minister Piyush Goyal has expressed confidence that India's exports would grow by around 6 per cent this year compared to the corresponding period in 2024.

On Global front, European markets were trading in green, amid Bank of England (BoE) is widely expected to hold its benchmark bank rate at 4.00 percent after a quarter-point reduction in August.  
Source: AceEquity

## NEWS BULLETIN

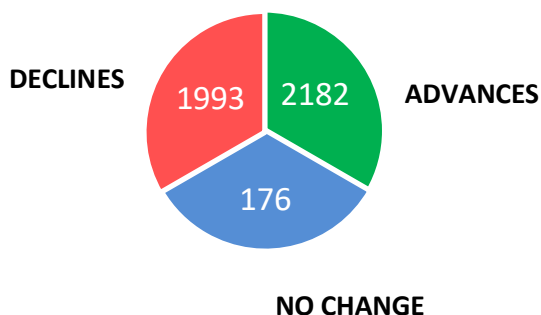
- **Capacit'e Infraprojects** has secured a prestigious order with a total contract value of Rs 1,518 crore, excluding taxes and cess, for '25 Downtown' by Hubtown. This order is for the construction of an Ultra Luxury Residential Towers in Mumbai, under the Super High-Rise category.
- **Jost's Engineering** Company has bagged purchase order from Hindustan Aeronautics on September 17, 2025 for 46 Platform Truck (3 Wheeler). The size of the order is Rs 2.54 crore. The said order is expected to be completed by December 2029.
- **Avantel** has bagged a purchase order worth Rs 12.51 crore (including taxes) from M/s Bharat Electronics. The order is for the supply of Satcom Products and it is to be executed by March 2026.

## MARKET DRIVING SECTOR : HEALTHCARE

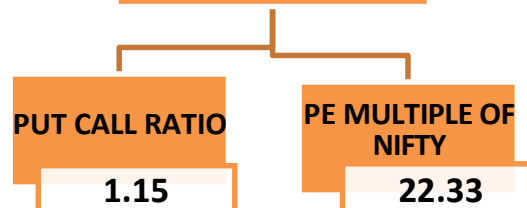


**S&P BSE: HEALTHCARE**  
**CLOSING: 45,130.04**  
**CHANGE: + 391.31**  
**CHANGE: + 0.87%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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