WEEKLY COMMENTARY

20th Sept 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	81,904.70	81,925.51	83,141.21	81,744.70	82,626.23	721.52	0.88
NIFTY 50	25,114.00	25,118.90	25,448.55	25,048.75	25,327.05	213.05	0.84

INDICES SHUT THE WEEK ON A POSITIVE NOTE

Indian equity benchmark ended on a green note in the week ended 20Th Sept, 2025. Key indices were positive in two out of five sessions of the week. The S&P BSE Sensex was up by 721.52 points or 0.88% to settle at 82,626.23 in the week ended 20th Sept, 2025. The CNX Nifty was up by 213.05 points or 0.84% to settle at 25,327.05. The BSE Mid-Cap index was up by 683.03 or 1.47% to settle at 46,867.33. The BSE Small-Cap index was up by 1073.55 points or 2.00% to settle at 54,622.04.

MARKET STATS

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ADANI ENTERPRISE	2524.0	2392.0	5.52
SBI BANK	862.35	823.55	4.71
MARUTI SUZUKI	15864	15325	3.52
BHARTI AIRTEL	1962.4	1902.6	3.14
KOTAK MAHINDRA	2031.0	1972.3	2.98

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TRENT LTD	5130.0	5528.5	-7.21
TITAN	3467.2	3571.9	-2.93
ASIAN PAINTS	2481.7	2546.3	-2.54
HINDALCO	743.30	758.05	-1.95
NESTLE INDIA	1194.5	1217.6	-1.90

Most Active (by value)

Name	Avg Value	Pr.	Qty
HDFC BANK	9624.9	966.90	995445.12
INFOSYS LTD	6500.6	1540.2	422062.96
RELIANCE	6248.4	1407.4	443970.88
ICICI BANK	6047.8	1402.2	431309.52
BHARTI AIRTEL	5805.5	1962.4	295838.98

Most Active (by volume)

Name	Avg Value	Pr.	Qty
TATA STEEL	1722.3	171.48	1004419.92
HDFC BANK	9624.9	966.90	995445.12
POWER GRID	1857.2	286.20	648941.96
ITC LTD	2595.8	410.65	632134.28
SBI BANK	4843.9	862.35	561712.32

INSTITUTIONAL NET POSITION

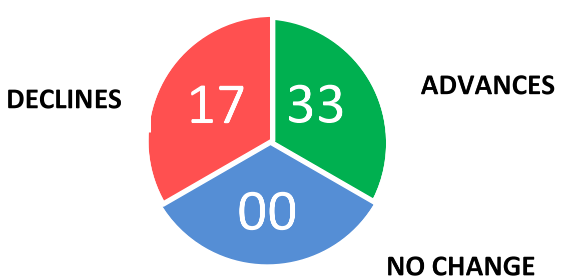
FIIs Cash	-1,327.38
FIIs Index Future	4,879.24
FIIs Stock Future	-1,703.19
DIIs Cash	11,177.37

On Monday, 15 Sept 2025, Indian equity benchmarks ended lower with Nifty 50 breaking an eight-session winning streak. On Tuesday, 16 Sept, 2025, Benchmarks rallied as optimism grew over India-US trade talks. On Wednesday, 17 Sept, 2025, Domestic equity benchmarks extended gains lifted by hopes of a US Fed Rate cut later in the day. On Thursday,18 Sept, 2025, Benchmarks ended higher for a third consecutive session amid US rate cut and progress in India-US trade talks. On Friday, 19 Sept 2025, Equity Benchmarks ended with moderate losses, halting a three-day rally. BSE Sensex tanked 387 points and Nifty 50 Index fell 96 points to 25,327.

Company Name	Quantity	Trade Price
Sammaan Capital	5,699,511	143.16
The Anup Engineering	103,335	2510.9
Netweb Technologies	332,882	3201.0
Urban Company	11,332,299	179.75
Mamata Machinery	381,249	502.21
Anlon Healthcare	500,000	135.00
Redington	7,491,460	306.57

BULK & BLOCK

NIFTY MARKET BREADTH (W) - POSITIVE



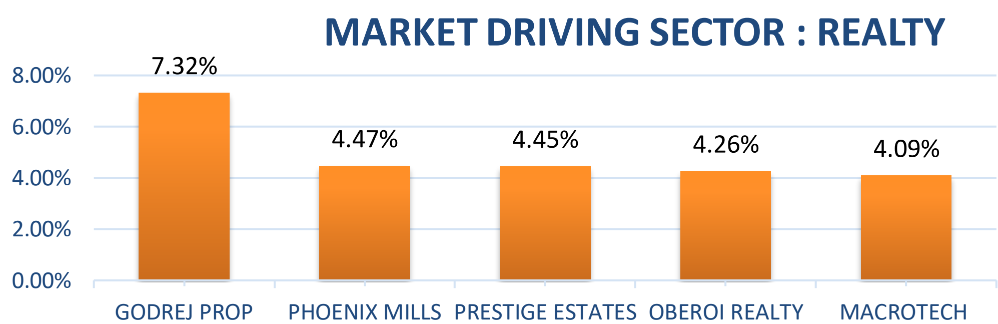
RATIO ANALYSIS

PUT CALL RATIO: 0.94

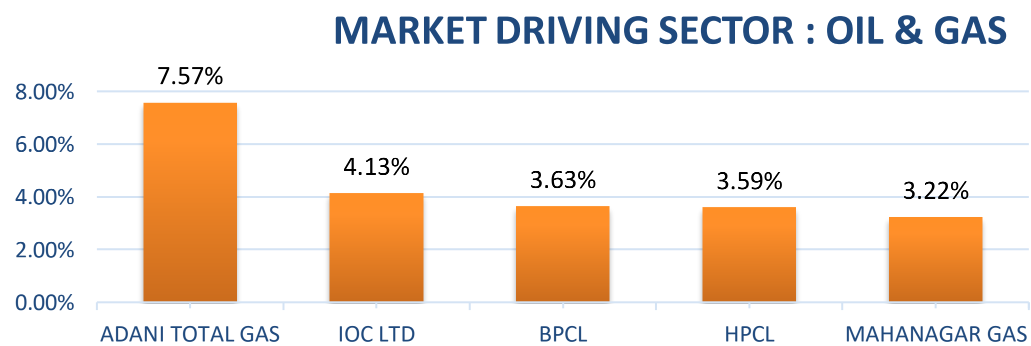
PE MULTIPLE OF NIFTY: 22.51

NEWS BULLETIN

- **Power Grid Corporation of India** has been declared as successful bidder under Tariff Based Competitive Bidding to establish Inter-State Transmission System for project 'Augmentation of transformation capacity and Implementation of line bays at Mandsaur S/s for RE Interconnection' on build, own, operate and transfer (BOOT) basis.
- **Hindustan Copper** has executed Rakha Mining Lease Deed with District Commissioner (DC), Jamshedpur on September 19, 2025. The lease has been extended for 20 years.
- **Housing and Urban Development Corporation (HUDCO) h**as signed a Memorandum of Understanding (MoU) with **NBCC (India**), on September 19, 2025**.** The non-binding MoU is for development of commercial plot at Kaushambi, Ghaziabad (Uttar Pradesh), institutional plot at Panchkula (Haryana), construction of additional blocks at HUDCO Regional Office, Ahmedabad (Gujarat) and reconstruction of residential flats at Asian Games Village Complex, New Delhi on turnkey basis as Deposit work.
- **JSW Energy's wholly owned subsidiary -- JSW Neo Energy** has signed a definitive agreement to acquire 100% shares in Tidong Power Generation (Tidong Power) from Statkraft IH Holding AS (Statkraft).



NIFTY REALTY
CLOSING: 923.50
CHANGE: +39.15
CHANGE: 4.42%



NIFTY OIL & GAS
CLOSING: 11333.30
CHANGE: +242.15
CHANGE: 2.18%

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