END DAY COMMENTARY

30th SEP 2025

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,364.94	80,541.77	80,677.82	80,201.15	80,267.62	-97.32	-0.12
NIFTY	24,634.90	24,691.95	24,731.80	24,587.70	24,611.10	-23.80	-0.10

INDICES CLOSED WITH MARGINALLY LOSS

The 30-share BSE Sensex was down by 97.32 points or 0.12% to settle at 80,267.62 and the Nifty was down by 23.80 points or 0.1% to settle at 24,611.10. The BSE Mid-Cap was up by 0.04% and BSE Small Cap was flat. On the sectoral front, Metal, Auto, Banks and Capital Goods were the gaining indices; on the flip side, FMCG, Healthcare, Oil & Gas, Realty, Consumer Durables and IT were the losing indices. Ultratech Cement, Adani Ports, Tata Motors, BEL and Bajaj Finance were the top gainers on the Sensex; ITC, Bharti Airtel, Trent, Titan and Bajaj Finserve on the flip side, were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a negative note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIPORTS	1,406.10	1,383.20	1.66
ULTRACEMCO	12,240.00	12,041.00	1.65
JSWSTEEL	1,140.30	1,122.20	1.61
TATAMOTORS	682.55	672.50	1.49
HINDALCO	764.00	753.80	1.35

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INDIGO	5,591.00	5,707.00	-2.03
ITC	401.70	407.25	-1.36
BAJAJFINSV	2,001.00	2,024.70	-1.17
BHARTIARTL	1,883.00	1,902.20	-1.01
TECHM	1,397.00	1,410.70	-0.97

Most Active (by value)

Name	Qty	Pr.	Value CR
ICICIBANK	2,01,66,871	1,348.90	2,720.91
HDFCBANK	2,82,96,687	952.5	2,692.34
RELIANCE	1,46,04,684	1,364.00	1,995.74
KOTAKBANK	58,61,937	1,996.00	1,170.04
BHARTIARTL	59,45,625	1,883.00	1,121.60

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	2,82,96,687	952.50	2,692.3
TATASTEEL	2,45,53,596	169.05	415.00
ICICIBANK	2,01,66,871	1,348.90	2,720.9
ETERNAL	1,88,41,393	325.80	613.72
POWERGRID	1,87,72,881	280.40	527.37

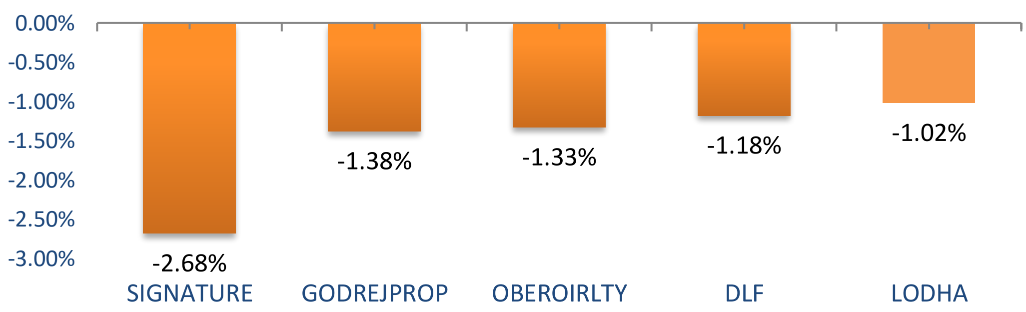
Indian equity benchmarks ended flat with negative bias on Tuesday, with both the Nifty and Sensex extending losses to eight consecutive sessions, amid persistent foreign institutional investors (FIIs) selling and increasing concerns over US tariffs. After making a positive start, soon indices turned volatile and traded near neutral lines throughout the day, as traders awaited the Reserve Bank of India's (RBI's) Monetary Policy Committee decision, which will be announced on Wednesday. Some concern also came as Asian Development Bank (ADB) stated that despite a strong 7.8 per cent growth in the first quarter, the Indian economy is expected to grow at 6.5 per cent in the current financial year as the impact of US tariffs on Indian exports will reduce prospects, particularly in the second half. Traders took note of India's industrial output growth eased slightly to 4% in August after a spike in July. Manufacturing output rose 3.8%, slowing from the 6 percent increase in the previous month.

On Global front, European markets were trading mostly in red, while Asian markets ended mixed due to uncertainty around U.S. President Donald Trump's trade tariffs and U.S. government shutdown fears amid a partisan deadlock in Congress over spending and healthcare leaves. Source:AceEquity

NEWS BULLETIN

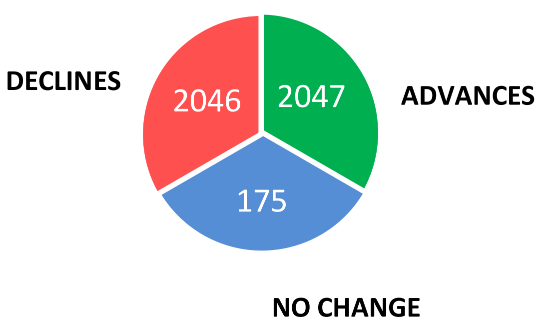
- **ITCONS E-Solutions** has received new contract worth Rs 53.06 lakh (inclusive of all taxes and duties) from Indian Council of Medical Research (ICMR), Mumbai, for the deployment of 7 skilled and semi-skilled resources.
- **Innovators Facade Systems** has received work order worth Rs 93.77 crore from DLF Info Park Developers (Chennai) (DLF Group). The work order is for the design, supply, installation & commissioning of facade glazing works. The work order is expected to be completed in 420 days from the date of commencement of project.
- **Saptak Chem and Business** has secured purchase order worth Rs 5.50 crore (exclusive of applicable taxes) from Shree Nakoda Agro Trading, Indore.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 6,740.13
CHANGE: - 53.67
CHANGE: - 0.79%

MARKET BREADTH – NEUTRAL



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.85	21.62

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