END DAY COMMENTARY

01th OCT 2025

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,267.62	80,173.24	81,068.43	80,159.90	80,983.31	+715.69	+0.89
NIFTY	24,611.10	24,620.55	24,867.95	24,605.95	24,836.30	+225.20	+0.92

REPO RATE KEPT UNCHANGED @ 5.5 %

The 30-share BSE Sensex was up by 715.69 points or 0.89% to settle at 80,983.31 and the Nifty was up by 225.20 points or 0.92% to settle at 24,836.30. The BSE Mid-Cap was up by 0.91% and BSE Small Cap was up by 1.16%. On the sectoral front, Banks, Metal, Auto, FMCG, Healthcare, Oil & Gas, Realty, Consumer Durables, IT and Capital Goods were the gaining indices; on the flip side, there was no losing index. Tata Motors, Kotak Bank, Trent, Sunpharma and Axis Bank were the top gainers on the Sensex; on the flip side, Bajaj Finance, SBIN, Ultratech Cement, Tata Steel and Asian Paint 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.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TATAMOTORS	718.00	680.20	5.56
SHRIRAMFIN	647.90	616.10	5.16
KOTAKBANK	2,067.70	1,992.70	3.76
TRENT	4,843.00	4,677.50	3.54
ADANIENT	2,594.30	2,505.90	3.53

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BAJFINANCE	987.35	998.90	-1.16
SBIN	865.15	872.45	-0.84
ULTRACEMCO	12,125.00	12,222.00	-0.79
BAJAJ-AUTO	8,616.00	8,678.50	-0.72
TATASTEEL	167.56	168.77	-0.72

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
ICICIBANK	2,09,52,632	1,372.00	2,868.25
HDFCBANK	2,53,50,832	965.80	2,438.09
TATAMOTOR	3,01,63,206	718.00	2,133.59
RELIANCE	1,20,45,916	1,370.00	1,649.76
KOTAKBANK	61,15,951	2,067.70	1,252.37

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATAMOTOR	3,01,63,206	718.00	2,133.5
HDFCBANK	2,53,50,832	965.80	2,438.0
ICICIBANK	2,09,52,632	1,372.00	2,868.2
ETERNAL	1,83,66,563	329.45	598.47
ITC	1,76,43,039	404.90	712.27

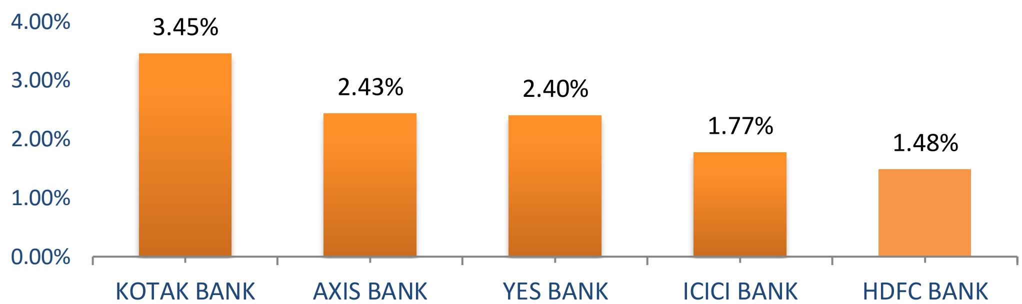
Indian equity benchmarks snapped their eight-day losing streak on Wednesday, with both the Nifty and Sensex closing near day's high points amid positive momentum in Banking, Pharma and Media sector stocks. Markets made cautious start but soon gained traction and traded higher throughout the day after the Reserve Bank of India (RBI) kept its policy interest rate unchanged at 5.5 per cent for the second consecutive time, citing concerns over tariff uncertainties. Also, the RBI lowered FY26 consumer price index (CPI) estimates to 2.6 per cent. The Reserve Bank has revised upward its growth estimates for the current fiscal year to 6.8 per cent and lowered its inflation projection to 2.6 per cent based on an above-normal monsoon and the rationalisation of GST rates. Traders took some support with Commerce and Industry Minister Piyush Goyal's statement that India is focusing on self-reliance by building capabilities and resilient supply chains, which will help the country tackle global challenges like weaponisation of trade.

On Global front, European markets were trading in green despite rise in Eurozone inflation in the month of September. Asian markets ended mostly in green following the positive cues from the US markets overnight.
Source:AceEquity

NEWS BULLETIN

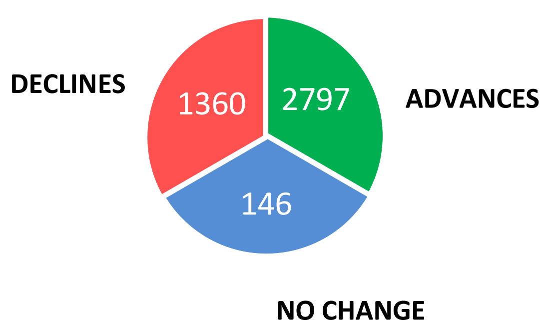
- **Ashok Leyland** has reported 9% rise in its total sales, including exports, at 18,813 units in September 2025 as compared to 17,233 units in September 2024. Light Commercial Vehicle (LCV) sales stood at 7,005 units in September 2025. Medium and heavy commercial vehicles (M&HCV) Trucks and Bus sales stood at 9,208 units and 2,600 units, respectively.
- **DMR Engineering** has secured a work order worth $2,24,000 from Ta Dam Energy Consulting Co. The order is for Engineering Consultancy Services for Hydropower Projects in Vientiane, Laos and to be executed within 11 months.
- **Quality Power Electrical Equipments** has received a purchase order for the Supply of High voltage Air core reactors. The combined value of the order is around Rs 13.94 crore.

MARKET DRIVING SECTOR : BANK



S&P BSE: BANK
CLOSING: 62,401.58
CHANGE: + 888.28
CHANGE: + 1.44%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO
1.18

PE MULTIPLE OF NIFTY
21.82

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