# END DAY COMMENTARY

06th OCT 2025

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| Index | Previous Close | Open | High | Low | Close | Change | Change% |
|---|---|---|---|---|---|---|---|
| SENSEX | 81,207.17 | 81,274.79 | 81,846.42 | 81,155.88 | 81,790.12 | + 582.95 | + 0.72 |
| NIFTY | 24,894.25 | 24,916.55 | 25,095.95 | 24,881.65 | 25,077.65 | + 183.40 | + 0.74 |

## INDICES STARTED THE WEEK WITH POSITIVE NOTE

The 30-share BSE Sensex was up by 582.95 points or 0.72% to settle at 81,790.12 and the Nifty was up by 183.40 points or 0.74% to settle at 25,077.65. The BSE Mid-Cap was up by 0.68% and BSE Small Cap was down by 0.20%. On the sectoral front, IT, Realty, Healthcare, Auto, Banks, Capital Goods and Oil & Gas were the gaining indices; on the flip side FMCG, Consumer Durables, and Metal were the losing indices. TCS, Tech Mahindra, Axis Bank, Eternal and Infosys were the top gainers on the Sensex; Tata Steel, Adani Ports, Power Grid, Titan, and Trent 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.

### Top Gainers

| Name | Closing Pr. | Previous Pr. | %Ch |
|---|---|---|---|
| MAXHEALTH | 1,137.00 | 1,069.20 | 6.34 |
| SHRIRAMFIN | 671.00 | 645.80 | 3.90 |
| TCS | 2,988.00 | 2,901.90 | 2.97 |
| TECHM | 1,439.60 | 1,400.60 | 2.78 |
| APOLLOHOSP | 7,636.00 | 7,449.50 | 2.50 |

### Top Losers

| Name | Closing Pr. | Previous Pr. | %Ch |
|---|---|---|---|
| TRENT | 4,705.00 | 4,815.70 | -2.30 |
| TATASTEEL | 170.35 | 173.21 | -1.65 |
| ADANIPORTS | 1,400.80 | 1,419.10 | -1.29 |
| POWERGRID | 286.75 | 289.70 | -1.02 |
| EICHERMOT | 6,876.00 | 6,941.00 | -0.94 |

## MARKET STATS (NSE)

### Most Active (by value)

| Name | Qty | Pr. | Value CR |
|---|---|---|---|
| AXISBANK | 2,01,28,505 | 1,208.00 | 2,426.79 |
| ICICIBANK | 1,43,14,283 | 1,363.90 | 1,952.67 |
| HDFCBANK | 1,85,42,683 | 973.9 | 1,804.81 |
| RELIANCE | 1,23,96,580 | 1,374.90 | 1,695.65 |
| KOTAKBANK | 51,52,836 | 2,142.70 | 1,098.81 |

### Most Active (by volume)

| Name | Qty | Pr. | Value CR |
|---|---|---|---|
| TATASTEEL | 2,14,74,004 | 170.35 | 366.00 |
| AXISBANK | 2,01,28,505 | 1,208.00 | 2,426.7 |
| HDFCBANK | 1,85,42,683 | 973.90x`x` | 1,804.8 |
| BEL | 1,46,84,188 | 413.05 | 604.15 |
| ICICIBANK | 1,43,14,283 | 1,363.90 | 1,952.6 |

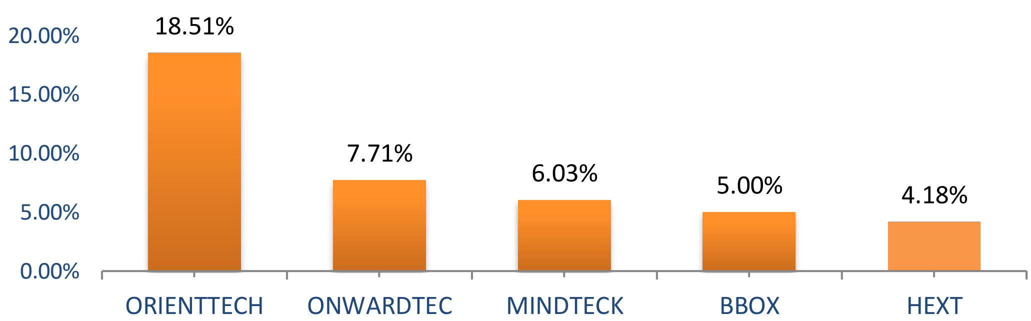
Indian equity benchmarks continued their northward journey for third consecutive session on Monday, supported by buying in IT and Banking stocks. After making cautious start, indices added gains and remained higher throughout the session, ahead to the upcoming corporate earnings season. Traders largely overlooked RBI data showing that India's forex reserves dropped by $2.33 billion to $700.23 billion during the week ended September 26. Traders took some support with the Global Trade Research Initiative (GTRI) stating that Joint ventures in energy infrastructure, technology collaboration, and cross-border investments can help reduce India's trade deficit with Qatar. Some support also came as the Commerce and Industry Minister Piyush Goyal's statement that greater collaboration between businesses of India and Singapore will help boost trade and investment ties between the two countries. Traders overlooked a survey showed growth in India's services sector cooled in September due to weaker overseas orders, yet it remained strong and optimism improved.

On Global front, European markets were trading in red as investors shrugged off the results of a survey, which showed investor confidence in the Eurozone has experienced a marked improvement in October 2025. Source:AceEquity

## NEWS BULLETIN

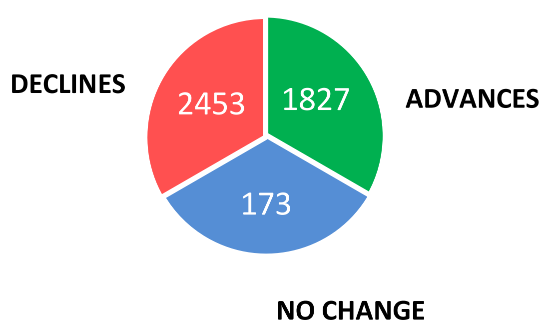
- **KEC International** has secured new orders of Rs 1102 crore across various businesses. Its civil business has secured a prestigious order for civil and structural works of a 150 MW thermal power plant from a leading private player in India.
- **Bondada Engineering's** subsidiary -- Bondada E&E has received Letter of Intent (LoI) worth Rs 63.86 crore (including GST) from Panchayati Raj Department, Government of Bihar. The order is for the implementation of Phase-IV of the Mukhyamantri Gramin Solar Street Light Yojana across districts of Bihar.
- **Sarveshwar Foods** has secured a significant export order worth Rs 26.6 crore from Delaware USA's Agri Services & Trade LLP, Singapore through its wholly owned subsidiary Green Point Pte., Singapore.

## MARKET DRIVING SECTOR : IT




**S&P BSE: IT**
**CLOSING: 34,207.39**
**CHANGE: + 658.96**
**CHANGE: + 1.96%**

## MARKET BREADTH – NEGATIVE




## RATIO ANALYSIS

| PUT CALL RATIO | PE MULTIPLE OF NIFTY |
|---|---|
| 1.34 | 22.18 |

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