END DAY COMMENTARY

09th OCT 2025

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	81,773.66	81,900.00	82,247.73	81,667.68	82,172.10	+ 398.44	+ 0.49
NIFTY	25,046.15	25,074.30	25,199.25	25,024.30	25,181.80	+ 135.65	+ 0.54

INDICES SHUT THE DAY IN GREEN NOTE

The 30-share BSE Sensex was up by 398.44 points or 0.49% to settle at 82,172.10 and the Nifty was up by 135.65 points or 0.54% to settle at 25,181.80. The BSE Mid-Cap was up by 0.75% and BSE Small Cap was up by 0.18%. On the sectoral front, Metal, IT, Realty, Banks, Healthcare, Auto, Oil & Gas, Capital Goods, FMCG and Consumer Durables were the gaining indices; on the flip side there were no losing index. Tata Steel, HCL Tech, Ultratech Cement, Sunpharma and BEL were the top gainers on the Sensex; Axis Bank, Titan, Maruti, Tata Motors and HDFC Bank 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 positive note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TATASTEEL	176.21	171.94	2.48
JSWSTEEL	1,172.00	1,145.20	2.34
SBILIFE	1,813.00	1,772.90	2.26
HCLTECH	1,484.50	1,453.20	2.15
BEL	409.90	403.65	1.55

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
AXISBANK	1,168.10	1,180.60	-1.06
TITAN	3,544.00	3,565.60	-0.61
TATACONSUM	1,115.00	1,120.20	-0.46
MARUTI	15,948.00	16,012.00	-0.40
HDFCBANK	975.00	978.70	-0.38

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,53,70,950	975.00	1,500.19
RELIANCE	88,26,633	1,376.50	1,214.77
TATASTEEL	6,85,04,717	176.21	1,207.26
TATAMOTOR	1,62,02,851	684.40	1,093.90
ICICIBANK	79,09,575	1,374.00	1,087.16

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	6,85,04,717	176.21	1,207.2
ETERNAL	2,34,97,999	345.50	811.60
TATAMOTOR	1,62,02,851	684.40	1,093.9
ITC	1,56,56,267	399.30	626.19
HDFCBANK	1,53,70,950	975.00	1,500.1

Indian equity benchmarks ended near day's high points on Thursday, with both the Nifty and Sensex closing over half a percent gains, ahead of earnings season. Investors were eyeing Tata Consultancy Services' (TCS) quarterly result to be out later in the day. After making a cautious start, indices gained traction in late morning session and ended higher, as traders remained optimistic over the easing geopolitical tensions, and with renewed interest from foreign investors. Some support came as Union Commerce and Industry Minister Piyush Goyal said no power on earth can stop India from becoming a developed nation by 2047 and that the government is taking a series of initiatives to promote the domestic economy, build infrastructure and expand international trade. Traders took note of report that Union Minister of Commerce and Industry, Piyush Goyal, paid an official visit to Doha, Qatar to co-chair the India-Qatar Joint Commission on Economic and Commercial Cooperation with H.E. Sheikh Faisal bin Thani bin Faisal Al Thani, Minister of Commerce and Industry of the State of Qatar.

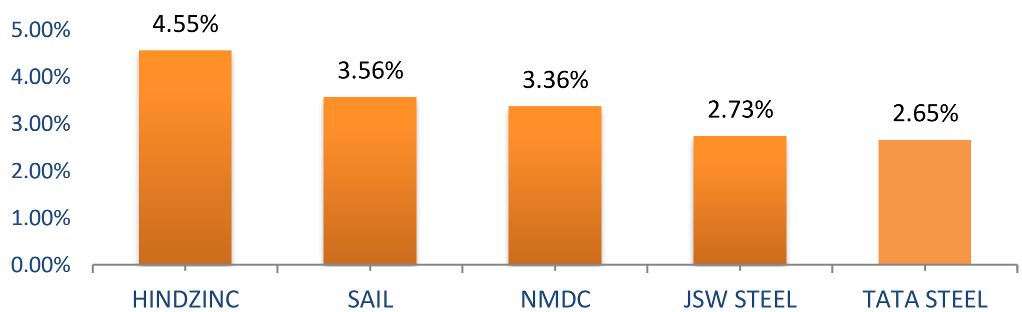
On Global front, European markets were trading mostly in red after Germany's exports declined for the second straight month in August as higher trade tariffs weighed on shipments to the United States. Asian markets ended mostly in green driven by robust investments in AI technology.

Source:AceEquity

NEWS BULLETIN

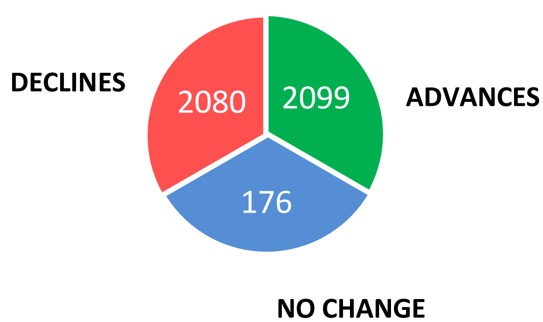
- **Pace Digitek** has received significant Operation and Maintenance (O&M) contract valued at Rs 185.87 crore from M/s Tata Teleservices. This entrusts Pace Digitek with full O&M responsibilities for the complete Managed Services including Outside Plant (OSP) Fiber Network Field Operations and Inside Plant (ISP) Operations across five Indian states-Andhra Pradesh, Telangana, Karnataka, Kerala, and Tamil Nadu.
- **Focus Lighting and Fixtures** has bagged an order worth Rs 1.87 crore (exclusive of GST) for city beautification from Gandhinagar Municipal Corporation. The order is for the purpose of manufacture, supply, delivery and installation of LED Lighting and Fixtures. The order is scheduled to be executed within one month.

MARKET DRIVING SECTOR : METAL



S&P BSE: METAL
CLOSING: 34,285.11
CHANGE: + 724.69
CHANGE: + 2.16%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.06	22.29

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