END DAY COMMENTARY

14th OCT 2025

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,327.05	82,404.54	82,573.37	81,781.62	82,029.98	- 297.07	-0.36
NIFTY	25,227.35	25,277.55	25,310.35	25,060.55	25,145.50	- 81.85	-0.32

INDICES IN RED AMID WEAK GLOBAL CUES

The 30-share BSE Sensex was down by 297.07 points or 0.36% to settle at 82,029.98 and the Nifty was down by 81.85 points or 0.32% to settle at 25,145.50. The BSE Mid-Cap was down by 0.74% and BSE Small Cap was down by 0.95%. On the sectoral front, there were no gaining index. On the flip side, Banks Realty, Metal, IT, Healthcare, Auto, Oil & Gas, Capital Goods, Consumer Durables and FMCG were losing indices. Tech Mahindra, ICICI Bank, Powergrid, Hindustan Unilever and Reliance were the top gainers on the Sensex; on the flip side, Bajaj Finance, BEL, Tata Steel, TCS and NTPC were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a negative note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
MAXHEALTH	1,159.50	1,143.30	1.42
TECHM	1,468.90	1,450.90	1.24
WIPRO	247.80	245.13	1.09
APOLLOHOSP	7,752.00	7,671.00	1.06
ICICIBANK	1,384.80	1,379.40	0.39

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
DRREDDY	1,235.00	1,262.40	-2.17
TATASTEEL	169.32	173.03	-2.14
BAJFINANCE	1,017.00	1,036.75	-1.90
BEL	402.15	409.40	-1.77
TRENT	4,604.00	4,681.60	-1.66

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	2,29,34,382	976.25	2,237.09
TATAMOTOR	5,22,67,874	395.00	2,112.56
ICICIBANK	1,06,10,855	1,384.80	1,465.86
RELIANCE	97,68,174	1,374.90	1,345.54
TCS	36,11,416	2,960.00	1,074.88

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATAMOTOR	5,22,67,874	395.00	2,112.5
ETERNAL	2,51,61,480	347.00	874.03
HDFCBANK	2,29,34,382	976.25	2,237
TATASTEEL	2,20,82,970	169.32	379.34
ONGC	1,38,65,005	244.15	342.33

Indian equity benchmarks failed to hold their opening gains and ended slightly lower on the day of the weekly F&O expiry. After a positive start, soon indices turned negative due to broad-based selling and profit booking in specific sectors. In the final hour of trade, the markets recouped some losses but remained below the flat line, weighed down by global uncertainties. Traders ignored the government report that India’s Wholesale price inflation (WPI) softened to 0.13 per cent in September 2025 on easing in prices of food articles, fuel and manufactured items. Traders overlooked the government data showed that India's retail inflation slowed to an over 8-year low of 1.54 per cent in September and slipped below Reserve Bank's comfort zone mainly due to subdued prices of vegetables, fruits and pulses. Some cautiousness came amid foreign fund outflows. Foreign investor’s net sold shares worth Rs 240 crore on Monday.

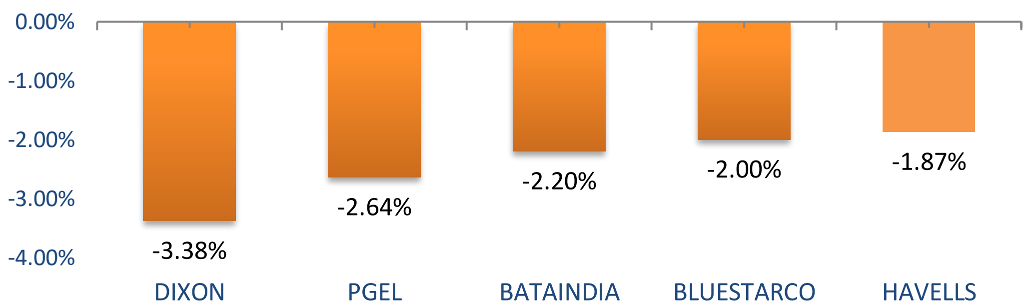
On Global front, European markets were trading in red as investors closely monitoring the ongoing political turmoil in France. Asian markets ended in red weighed down by escalating trade tensions between the U.S. and China.

Source:AceEquity

NEWS BULLETIN

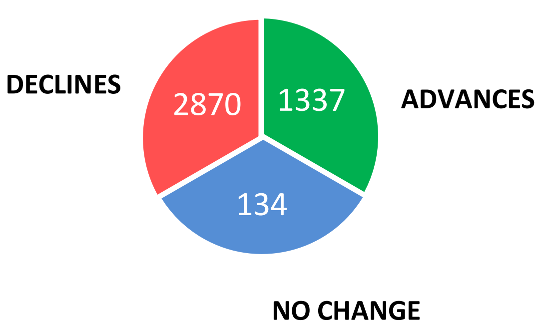
- **Bharti Airtel** has entered into a strategic partnership with Google to set up India’s first Artificial Intelligence (AI) hub in Visakhapatnam, Andhra Pradesh. This landmark initiative will accelerate the adoption of AI across India, strengthen the country’s digital backbone.
- **IREDA** has reported 41.59% rise in its net profit at Rs 549 crore for the second quarter ended September 30, 2025 as compared to Rs 387.75 crore for the same quarter in the previous year.
- **Anand Rathi Wealth** has reported 29.44% rise in its net profit at Rs 97.16 crore for second quarter ended September 30, 2025 (Q2FY26) as compared to Rs 75.06 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : CONSUMER DURABLES



S&P BSE: CONSUMER DURABLES
CLOSING: 58,535.69
CHANGE: - 670.66
CHANGE: - 1.13%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.82	22.23

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