END DAY COMMENTARY

24th OCT 2025

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	84,556.40	84,667.23	84,707.44	83,957.15	84,211.88	- 344.52	- 0.41
NIFTY	25,891.40	25,935.10	25,944.15	25,718.20	25,795.15	- 96.25	- 0.37

PROFIT BOOKING SEEN AT HIGHER LEVELS

The 30-share BSE Sensex was down by 344.52 points or 0.41% to settle at 84,211.88 and the Nifty was down by 96.25 points or 0.37% to settle at 25,795.15. The BSE Mid-Cap was down by 0.26% and BSE Small Cap was down by 0.19%. On the sectoral front, Metal, Oil & Gas, Capital Goods and Realty were gaining indices. On the flip side, Banks, Healthcare, Auto, FMCG, Consumer Durables and IT were losing indices. Bharti Airtel, ICICI Bank, BEL, Sunpharma and ITC were the top gainers on the Sensex; on the flip side, Hindustan Unilever, Ultratech Cement, Kotak Bank, Adani Ports and Titan 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
HINDALCO	825.00	792.40	4.11
ICICIBANK	1,378.00	1,363.70	1.05
BHARTIARTL	2,028.00	2,007.90	1.00
SHRIRAMFIN	716.50	709.65	0.97
ONGC	254.68	252.31	0.94

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
CIPLA	1,584.60	1,645.10	-3.68
HINDUNILVR	2,515.00	2,601.60	-3.33
MAXHEALTH	1,183.70	1,211.00	-2.25
ULTRACEMCO	11,910.00	12,145.00	-1.93
ADANIPORTS	1,426.70	1,453.10	-1.82

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,77,07,768	995.90	1,769.70
ICICIBANK	1,05,70,263	1,378.00	1,454.62
RELIANCE	97,00,837	1,451.10	1,406.85
HINDALCO	1,69,05,398	825.00	1,388.27
INFY	86,52,257	1,523.90	1,320.11

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	3,55,67,993	326.50	1,162.9
TATASTEEL	2,52,26,376	174.42	441.81
BEL	1,87,20,794	422.40	789.31
ONGC	1,78,82,209	254.68	456.82
HDFCBANK	1,77,07,768	995.90	1,769.7

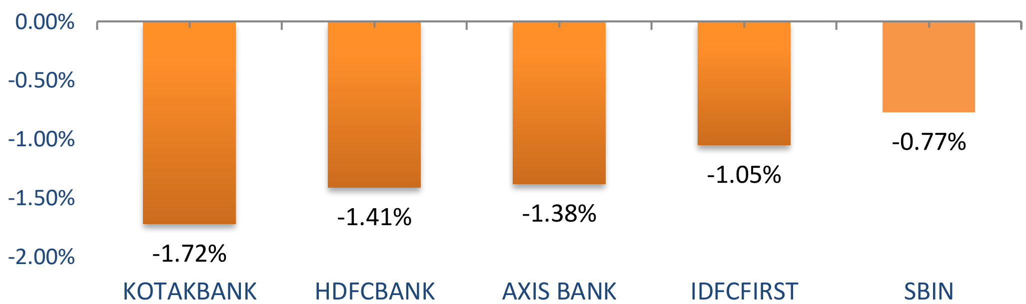
Indian equity benchmarks ended lower on Friday after India's private sector activity eased to five-month low in October. Markets made a positive start but soon slipped below neutral lines amid profit-taking after almost a week-long rally and fresh foreign fund outflows. Foreign investor's net sold shares worth Rs 1,166 crore on Thursday. In dying hours of trade, markets tried to recover but failed to enter green terrain amid weakness in FMCG, healthcare, and private bank stocks. Traders were concerned as India's flash PMI data report has showed that private sector growth lost momentum amid a slowdown in the service economy. The HSBC Flash India Composite Output Index fell to 59.9 in October from 61.0 in September. Traders took note of Crisil report that corporate revenue is expected to have grown a modest 5-6% on-year in the July-September quarter, following underwhelming performance of the power, coal, IT services and steel sectors. The MoD has said the Defence Acquisition Council (DAC) has approved procurement proposals worth Rs 79,000 crore to enhance the capabilities of the Indian armed forces.

On Global front, European markets were trading in red as earnings proved to be a mixed bag and investors braced for the release of delayed U.S. inflation figures for September. Asian markets ended in green ahead of pivotal talks between the United States and China in Malaysia to avert trade war escalation.

NEWS BULLETIN

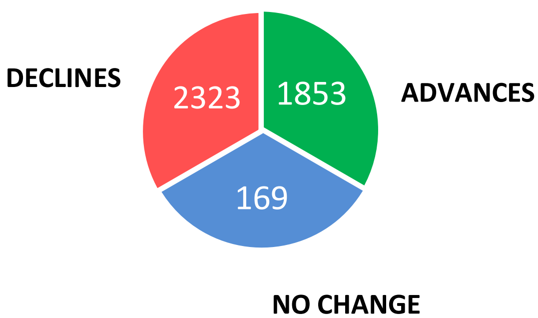
- **ITC Hotels** has reported 44.60% jump in its net profit at Rs 151.63 crore for the quarter ended September 30, 2025 as compared to Rs 104.86 crore for the same quarter in the previous year. The total income of the company increased by 13.02% at Rs 806.07 crore for Q2FY26 as compared to Rs 713.23 crore for the corresponding quarter previous year.
- **Refex Industries** has procured an order for removal of OB, excavation and Transportation of Coal from Large Mining Entity in Jharkhand. The size of the order is Rs 300 crore. The said order is to be executed in 8 months plus extension of 4 years.
- **Laurus Labs** has reported over 5-fold jump in its net profit at Rs 215.67 crore for the quarter ended September 30, 2025 as compared to Rs 42.44 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : BANK



S&P BSE: BANK
CLOSING: 65,090.04
CHANGE: - 507.89
CHANGE: - 0.77%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.75	22.67

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