END DAY COMMENTARY

27th OCT 2025

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	84,211.88	84,297.39	84,932.08	84,294.20	84,778.84	+ 566.96	+ 0.67
NIFTY	25,795.15	25,843.20	26,005.95	25,827.00	25,966.05	+ 170.90	+ 0.66

BOURSES START THE WEEK WITH POSITIVE NOTE

The 30-share BSE Sensex was up by 566.96 points or 0.67% to settle at 84,778.84 and the Nifty was up by 170.90 points or 0.66% to settle at 25,966.05. The BSE Mid-Cap was up by 0.72% and BSE Small Cap was up by 0.51%. On the sectoral front, Oil & Gas, IT, Metal, Banks, Auto, FMCG, Consumer Durables, Capital Goods and Realty were gaining indices. On the flip side, Healthcare, were losing index. Bharti Airtel, Reliance, Eternal, SBIN and TMPV were the top gainers on the Sensex; on the flip side, Kotak Bank, BEL, Infosys, Adani Ports and Bajaj Finance 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
GRASIM	2,932.70	2,841.30	3.22
SBILIFE	1,898.00	1,839.80	3.16
BHARTIARTL	2,083.00	2,029.30	2.65
SBIN	926.90	904.50	2.48
RELIANCE	1,483.20	1,451.60	2.18

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
KOTAKBANK	2,149.40	2,187.00	-1.72
BEL	415.30	422.05	-1.60
BAJFINANCE	1,082.60	1,089.75	-0.66
ADANIENT	2,490.00	2,504.20	-0.57
ONGC	253.60	254.96	-0.53

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
RELIANCE	1,41,13,867	1,483.20	2,089.18
ICICIBANK	1,14,99,836	1,379.60	1,585.97
HDFCBANK	1,57,00,796	1,003.50	1,576.22
BHARTIARTL	57,96,831	2,083.00	1,204.89
INFY	72,73,211	1,504.90	1,095.71

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	2,77,03,118	333.35	914.59
TATASTEEL	2,38,32,477	176.61	421.41
HDFCBANK	1,57,00,796	1,003.50	1,576.2
RELIANCE	1,41,13,867	1,483.20	2,089.1
POWERGRID	1,33,96,182	291.00	390.12

Indian equity benchmarks held gaining momentum till the end of the session on Monday. Investors were braced for U.S. Federal Reserve's rate decision during this week. After making positive start, indices extended their gains amid easing trade tensions between US and China. In afternoon session, markets continued to trade higher as traders preferred to buy fundamental strong stocks. Finally, Sensex and Nifty ended above 84,700 marks and 25,950 marks respectively. As per a report, India and the US are 'very near' to concluding the proposed bilateral trade agreement as both the sides are converging on most of the issues. It said the two countries are sorting out the language of the agreement. Traders took note of report that Commerce and Industry Minister Piyush Goyal will visit Brussels for talks with his EU counterpart to give political impetus to the proposed trade pact, as the deadline to conclude negotiations nears. Discussions are expected to cover key areas of the proposed FTA, including market access, non-tariff measures, and regulatory cooperation.

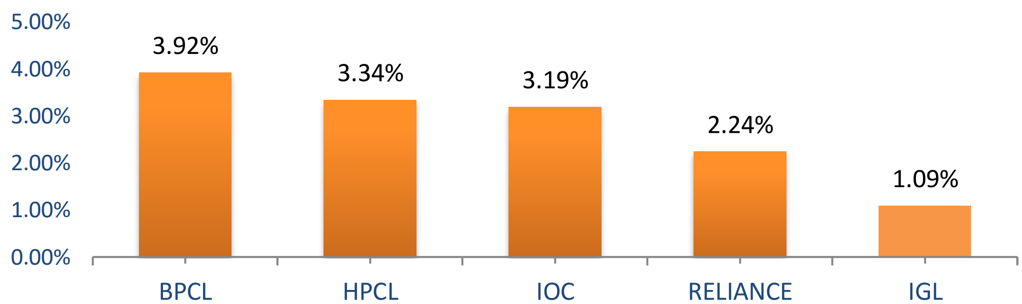
On Global front, European markets were trading mostly in red ahead of earnings release of big tech companies and policy rate decision of European Central Bank.

Source: Ace Equity

NEWS BULLETIN

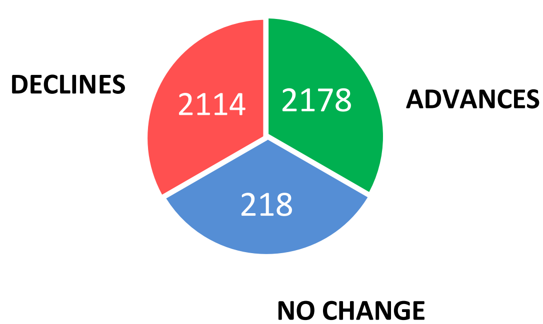
- **Hatsun Agro Product** has reported 86.85% rise in its net profit at Rs 120.18 crore for the quarter ended September 30, 2025 as compared to Rs 64.32 crore for the same quarter in the previous year. The total income of the company increased by 14.75% at Rs 2,385.38 crore for Q2FY26 as compared to Rs 2,078.72 crore for the corresponding quarter previous year.
- **Indiamart Intermesh** has reported 34.25% fall in its net profit at Rs 83.50 crore for the quarter ended September 30, 2025 as compared to Rs 127 crore for the same quarter in the previous year.
- **Kotak Mahindra Bank** reported 2.70% fall in its net profit at Rs 3,253.33 crore for the quarter ended September 30, 2025 as compared to Rs 3,343.72 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : OIL & GAS



S&P BSE: OIL & GAS
CLOSING: 27,988.20
CHANGE: + 413.16
CHANGE: + 1.50%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO
1.05

PE MULTIPLE OF NIFTY
22.82

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