END DAY COMMENTARY

29th OCT 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	84,628.16	84,663.68	85,105.83	84,638.68	84,997.13	+368.97	+0.44
NIFTY	25,936.20	25,982.00	26,097.85	25,960.30	26,053.90	+117.70	+0.45

SENTIMENT REMAINS POSITIVE AMID FII'S INFLOW

The 30-share BSE Sensex was up by 368.97 points or 0.44% to settle at 84,997.13 and the Nifty was up by 117.70 points or 0.45% to settle at 26,053.90. The BSE Mid-Cap was up by 0.68% and BSE Small Cap was up by 0.56%. On the sectoral front, Oil & Gas, Metal, IT, Healthcare, Auto, FMCG, Realty, Consumer Durables, Capital Goods and Banks were gaining indices. On the flip side, there were no losing index. Adani Ports, NTPC, Powergrid, HCL Tech and Tata Steel were the top gainers on the Sensex; on the flip side, BEL, Eternal, Mahindra & Mahindra, Bajaj Finance and Maruti 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
NTPC	349.00	339.15	2.90
ADANIPORTS	1,456.00	1,417.90	2.69
ONGC	257.09	250.54	2.61
POWERGRID	295.25	288.25	2.43
JSWSTEEL	1,212.60	1,184.20	2.40

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
DRREDDY	1,258.40	1,289.40	-2.40
COALINDIA	382.95	391.40	-2.16
BEL	407.60	413.55	-1.44
ETERNAL	330.65	334.60	-1.18
M&M	3,539.50	3,579.10	-1.11

Most Active (by value)

Name	Qty	Pr.	Value CR
ICICIBANK	1,61,29,382	1,371.60	2,201.90
HDFCBANK	1,77,69,445	1,008.50	1,790.96
RELIANCE	1,18,84,745	1,504.00	1,785.87
SBIN	1,23,14,222	939.00	1,154.94
COALINDIA	2,68,56,509	382.95	1,045.50

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	5,16,10,530	185.00	955.98
COALINDIA	2,68,56,509	382.95	1,045.5
ETERNAL	1,96,79,008	330.65	650.96
HDFCBANK	1,77,69,445	1,008.50	1,790.9
ICICIBANK	1,61,29,382	1,371.60	2,201.9

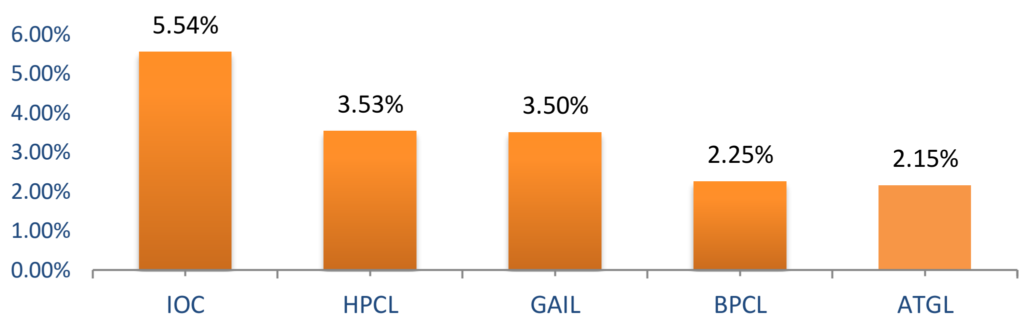
Indian equity benchmarks ended in positive territory on Wednesday, with the Nifty closing above the 26,000 mark and the Sensex finishing around the 85,000 level, supported by broad-based buying across sectors and strong inflows from foreign investors. Markets made a positive start and remained higher throughout the session, as investors were optimistic over a trade deal between India and US after US President Donald Trump hinted that the US is doing a trade deal with India. Some optimism came as India's industrial production growth remained steady at 4 per cent in September this year due to the good performance of the manufacturing sector buoyed by GST rationalisation and festive demand. Traders took note of a report that the negotiating teams of India and the European Union are making good progress on tariff-related issues and an EU delegation will visit India next week to further iron out differences for an early conclusion of the proposed free trade agreement (FTA). Sentiments remain upbeat as Foreign institutional investors (FIIs) were net buyers of shares worth Rs 10,339.80 crore on Tuesday.

On Global front, European markets were trading mostly in red ahead of a Federal Reserve interest-rate cut expected later in the day. Asian markets ended mostly in green as investors are also looking ahead to the meeting of U.S. President Donald Trump and Chinese President Xi Jinping. Source: Ace Equity

NEWS BULLETIN

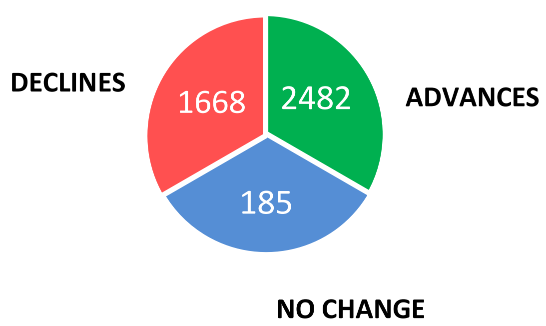
- **Premier Energies** has reported over three-fold jump in its net profit at Rs 55.11 crore for the quarter ended September 30, 2025 as compared to Rs 15.98 crore for the same quarter in the previous year.
- **BMW Ventures** has secured an order worth Rs 5.11 crore for supply of Built up Section along with accessories for Kolkata airport. The order has been secured by the PEB Manufacturing division of the company.
- **Apollo Micro Systems** has received cumulative orders worth Rs 18.43 crore from the DRDO, Defense Public Sector undertakings and Private Companies.
- **Varun Beverages** has reported 17.28% rise in its net profit at Rs 577.40 crore for the quarter ended September 30, 2025 as compared to Rs 492.34 crore for the same quarter in the previous year

MARKET DRIVING SECTOR : OIL & GAS



S&P BSE: OIL & GAS
CLOSING: 28,521.75
CHANGE: + 709.16
CHANGE: + 2.55%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.13	22.91

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