END DAY COMMENTARY

30th OCT 2025

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	84,997.13	84,750.90	84,906.95	84,312.65	84,404.46	-592.67	-0.70
NIFTY	26,053.90	25,984.40	26,032.05	25,845.25	25,877.85	-176.05	-0.68

INDICES IN RED AMID WEAK GLOBAL CUES

The 30-share BSE Sensex was down by 592.67 points or 0.70% to settle at 84,404.46 and the Nifty was down by 176.05 points or 0.68% to settle at 25,877.85. The BSE Mid-Cap was up by 0.001% and BSE Small Cap was down by 0.06%. On the sectoral front, Oil & Gas, Capital Goods and Realty were gaining indices. On the flip side, Metal, IT, Auto, Consumer Durables, FMCG, Banks Healthcare were losing indices. Larsen & Toubro, BEL, Ultratech Cement, Maruti and Adani Ports were the top gainers on the Sensex; on the flip side, Bharti Airtel, Powergrid, Tech Mahindra, Infosys and Bajaj Finance 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
COALINDIA	388.05	382.00	1.58
LT	3,989.40	3,958.10	0.79
HINDALCO	863.00	856.25	0.79
BEL	410.20	407.20	0.74
NESTLEIND	1,280.00	1,273.00	0.55

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
DRREDDY	1,203.50	1,250.90	-3.79
CIPLA	1,541.00	1,581.10	-2.54
HDFCLIFE	746.00	761.30	-2.01
INDIGO	5,715.50	5,813.00	-1.68
BHARTIARTL	2,069.00	2,100.60	-1.50

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,99,62,917	999.95	1,999.35
LT	49,59,400	3,989.40	1,992.93
RELIANCE	93,18,663	1,489.50	1,390.59
ICICIBANK	93,24,401	1,362.40	1,272.06
SBIN	1,30,44,473	934.5	1,224.72

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	2,42,70,977	184.45	445.28
HDFCBANK	1,99,62,917	999.95	1,999.3
ETERNAL	1,98,00,315	329.20	651.47
COALINDIA	1,51,54,040	388.05	583.70
SBIN	1,30,44,473	934.50	1,224.7

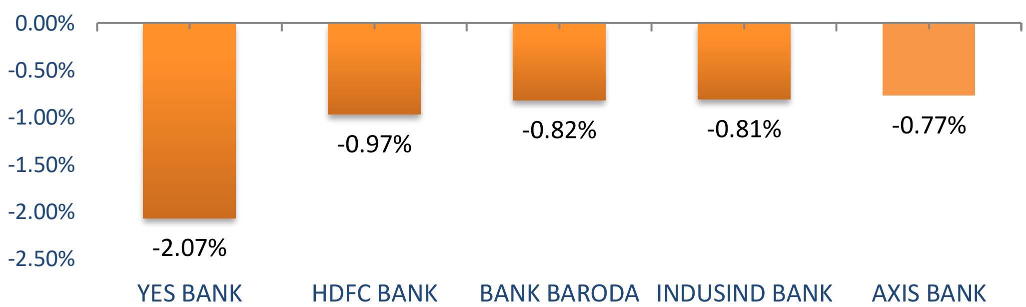
Indian equity benchmarks ended sharply lower on Thursday, as all sectoral indices finished in the red, with broad-based selling and profit booking at record-high levels. Indices made a negative start and remained under selling pressure throughout the session, as traders were cautious after Federal Reserve Chair Jerome Powell indicated that further interest rate cuts are not guaranteed. Traders overlook Chief Economic Advisor (CEA) V Anantha Nageswaran exuding confidence that real Gross Domestic Product (GDP) growth of India is likely to touch 7 per cent in FY26. Minister of Petroleum and Natural Gas, Hardeep Singh Puri, has said that India's rapid economic growth is closely connected to the progress of its energy and shipping sectors, which together serve as strong pillars of national development. Sentiments remained downbeat as Foreign Institutional Investors (FIIs) were net sellers, offloading equities worth Rs 2,540.2 crore on October 29.

On Global front, European markets were trading in red ahead of European Central Bank's interest-rate decision later in the day. Asian markets ended mostly in red after Bank of Japan left interest rate unchanged as expected but hinted at future hikes as inflation remains above target. Source: Ace Equity

NEWS BULLETIN

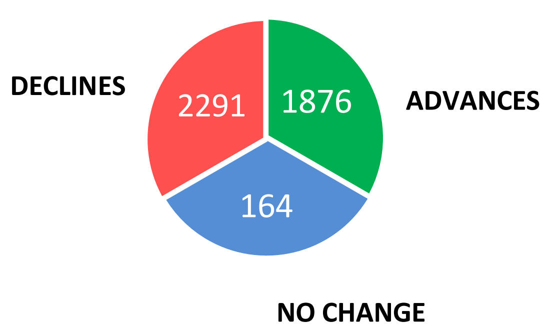
- **Hyundai Motor India** has reported 17.38% rise in its net profit at Rs 1,570.25 crore for the second quarter ended September 30, 2025 as compared to Rs 1,337.79 crore for the same quarter in the previous year.
- **Cipla** has reported 2.75% rise in its net profit at Rs 1,210.53 crore for the quarter ended September 30, 2025 as compared to Rs 1,178.16 crore for the same quarter in the previous year.
- **Canara Bank** has reported 18.92% rise in its net profit at Rs 4,773.96 crore for the quarter ended September 30, 2025 as compared to Rs 4,014.53 crore for the same quarter in the previous year.
- **SAIL** has reported 48.80% fall in its net profit at Rs 426.79 crore for the second quarter ended September 30, 2025 (Q2FY26) as compared to Rs 833.52 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : BANK



S&P BSE: BANK
CLOSING: 65,298.12
CHANGE: - 473.32
CHANGE: - 0.72%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.75	22.77

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