

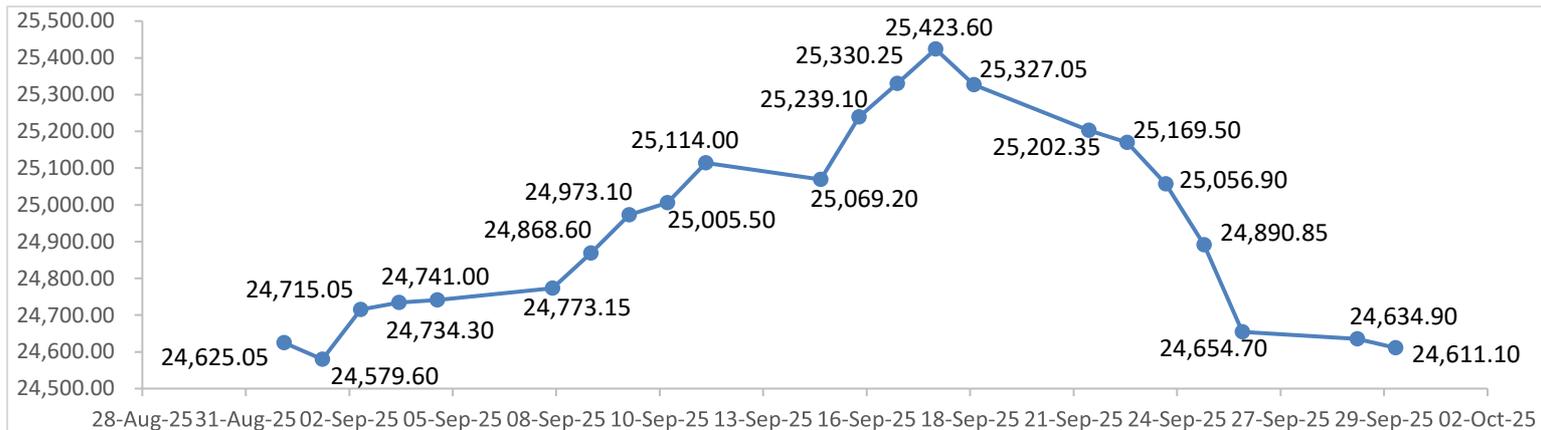
Nifty 50

24,611.10 184.25
(0.75%)

52 Week High: 26,277.4

52 Week Low: 21,743.6

Resistance		Support	
R1	24,700	S1	24,327.5
R2	25,143.7	S2	24,134.9
R3	25,455.4	S3	23,823.1



Sectorial Indices	Prev. Close (29-Aug'25)	Close (30-Sep'25)	% Change (1M)
Nifty Auto	24,960	26,542.35	6.34%
Nifty PSU Bank	6,756	7526.75	11.41%
Nifty Pharma	21,804	21,454.25	-1.60%
Nifty IT	35,181	33,655.10	-4.34%
Nifty FMCG	56,141	54,710.70	-2.55%
Nifty Metal	9,154	10,038.15	9.65%
Nifty Fin Serv	25,567	26,022.10	1.78%
Nifty Cons	38,590	37,114.50	-3.82%

Top Gainers	Prev. Close (29-Aug'25)	Close (30-Sep'25)	% Change (1M)
ADANIEN	2,176.2	2,429.4	11.63%
AXISBANK	1,045.2	1,131.6	8.27%
JSWSTEEL	1,026.6	1,142.7	11.31%
BAJFINANCE	877.85	998.9	13.79%
SHRIRAMFIN	580.25	616.1	6.18%

Top Losers	Prev. Close (29-Aug'25)	Close (30-Sep'25)	% Change (1M)
TRENT	5,298	4,677.5	-11.71%
MAXHEALTH	1,154.3	1,114.7	-3.43%
TECHM	1,481.4	1,400.3	-5.47%
ASIANPAINT	2,518.6	2,350	-6.69%
TCS	3,084.7	2,888.4	-6.36%

Global Indices	Prev. Close (29-Aug'25)	Close (30-Sep'25)	% Change (1M)
Dow Jones	45,544	46,397.89	1.87%
Nasdaq	21,455	22,660.01	5.62%
FTSE	9,187	9,350.43	1.78%
Hang Seng	25,077	26,855.56	7.09%
USD/INR	88.17	88.84	0.76%
GBP/INR	117.11	119.47	2.02%

Net Flow	Amount (Rs Cr)	Index	Prev. Close (29-Aug'25)	Close (30-Sep'25)	% Change (1M)
FII	-35,301.3	SENSEX	79,809	80,267	0.57%
DII	65,343.5	NIFTY 50	24,426	24,611	0.76%
MF Equity	30,422	BANK NIFTY	53,655	54,635	1.83%
MF Debt	-1,01,977				

Commodities	Prev. Close (29-Aug'25)	Close (30-Sep'25)	% Change (1M)
Gold	1,03,824	1,17,265	12.95%
Silver	1,20,371	1,42,145	18.09%
Crude (WTI)	60.79	62.37	2.60%

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India's 10-Year Bond Yield Eases on Fiscal Discipline Assurances:

India's benchmark 10-year government bond yield declined to around 6.45% in September, retreating from a four-month high of 6.63% recorded on August 23, as concerns over a wider fiscal deficit eased. Bond markets found support after Finance Minister Nirmala Sitharaman reiterated the government's commitment to achieving a fiscal deficit target of 4.4% of GDP in the current financial year. She also signaled that no additional debt issuance would be required to fund expansionary policies. The assurance improved investor confidence, boosted demand for government securities, and helped stabilise yields amid global rate and fiscal uncertainty.

WTO Revises Global Trade Outlook Amid Tariff Uncertainty:

The World Trade Organization (WTO) has raised its global trade growth forecast for 2025 to 0.9%, revising earlier expectations of a 0.2% contraction. The upgrade was driven largely by a sharp rise in U.S. imports, which jumped 11% year-on-year in the first half of 2025, as companies accelerated shipments ahead of new tariff measures. Similar front-loading trends were observed globally. However, WTO economists warned that newly implemented tariffs will weigh on trade momentum later in 2025 and into 2026, prompting a downward revision of the 2026 growth forecast to 1.8% from 2.5%.

EU Approves 102 More Indian Marine Export Units, Boosting Seafood Trade:

In early September 2025, the European Union approved 102 additional Indian marine product units for exports, raising the total number of EU-approved Indian facilities to 604. The move is expected to significantly strengthen India's seafood trade with the bloc, its second-largest export destination. Officials estimate the approval could boost seafood exports to the EU by nearly 20%, supporting exporters amid global trade challenges. In FY 2023–24, India's seafood exports to the EU were valued at around \$1.1 billion, underlining the importance of the market for the sector.

Global Stocks, Gold Rally on Rate-Cut Hopes Amid U.S. Policy Shifts:

MSCI's global equity index rose to record highs for the third straight session, led by strength in select U.S. technology stocks as investors priced in expectations of future Federal Reserve rate cuts and easing risk sentiment. At the same time, gold prices rallied to fresh record levels while the U.S. dollar weakened, reflecting safe-haven demand and shifting monetary outlooks. Market attention was also focused on U.S. domestic policy, including President Donald Trump's announcement that companies may face a \$100,000 fee for new H-1B work visas, a move seen as potentially increasing costs for the technology sector and influencing market dynamics.

IPO Update :-

Company Name	IPO Date (September'25)	Market Response
Urban Company	10 Sep – 12 Sep	108.98x oversubscribed
TruAlt Bioenergy	25 Sep – 29 Sep	75.02x oversubscribed
Seshaasai Technologies	23 Sep – 25 Sep	69.64x oversubscribed

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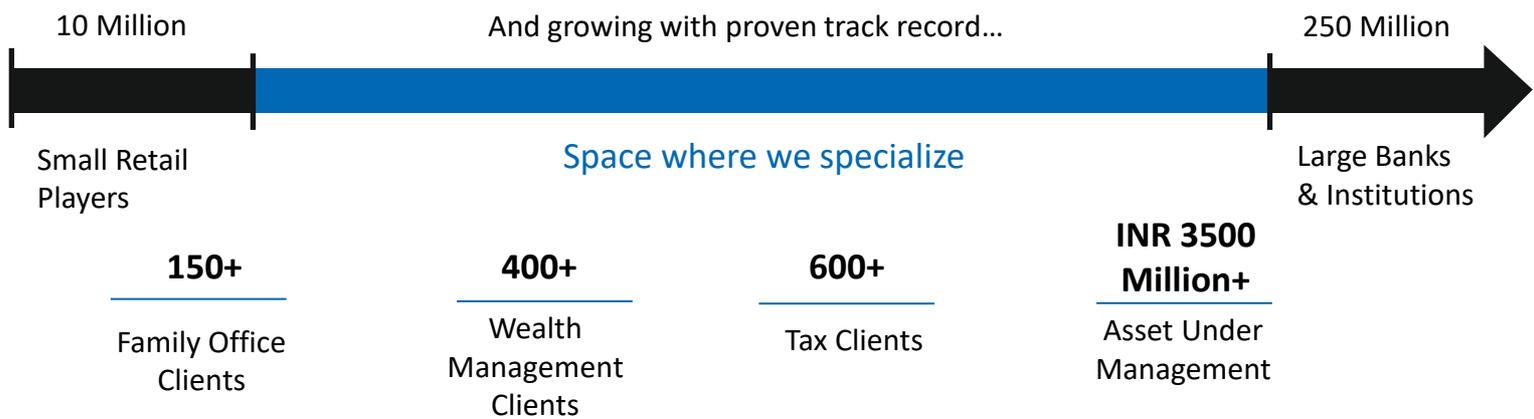
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