

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	22,421.95	-198.50	-0.88	0.00	-14.25
BSE Sensex	71,909.70	-570.59	-0.79	0.00	-15.59
Bank Nifty	54,450.75	-182.3	-0.33	0.00	-8.81
Nifty Midcap 100	58,732.00	-600.05	-1.01	0.00	-3.32
Nifty Smallcap 100	19,058.65	-187.05	-0.97	0.00	7.65
S&P 500	7,722.72	56.27	0.73	0.73	12.60
DJIA	51,176.96	250.4	0.49	0.49	5.78
Nasdaq 100	30,807.93	306.37	1.00	1.00	22.22
Nikkei 225	68,309.46	-647.26	-0.94	-0.94	31.79
Hang Seng	23,972.29	-640.98	-2.60	0.00	-8.98
Shanghai Com	3,842.20	11.74	0.31	0.00	-4.50

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	22,421.95	54,450.75
Support	22,223 & 22,023	53,981 & 53,511
Resistance	22,616 & 22,810	55,006 & 55,561

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,260.26	21,744.48	-9,484.22
DII Cash Market	25,420.04	15,378.20	10,041.84

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Infosys	1035.00	4.11	15166.45
HDFC Life	534.20	2.49	4008.94
HDFC bank	721.20	1.76	37389.86
SBI Life Insurance	1721.60	1.49	3329.86
Max Healthcare	940.95	1.20	5464.46
Top Losers			
Bajaj Auto	10045.00	-7.62	1491.30
Maruti Suzuki	11386.00	-4.86	885.82
Shriram Finance	945.00	-3.84	5599.67
Tata Steel	178.00	-3.42	47659.95
Adani Ports	1737.80	-3.36	2157.93

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	102.25	-0.06	68.31
WTI (USD/bbl)	91.11	-1.90	58.95
Gold Spot (USD/t oz.)	4,141.19	-0.87	-4.41
USD/INR	96.32	-0.51	7.06
10 Year G-Sec India	7.21	0.35	9.60
US 10 Year Bond	5.27	0.57	26.49

Source: Bloomberg

MARKET COMMENTARY

Equity:

India

Indian equities extended their losing streak on Thursday, with the Nifty 50 and Sensex falling 0.8% amid elevated oil prices, persistent FII outflows and Middle East uncertainties, while investors remained cautious ahead of the RBI's October 7 policy decision.

Global

US equities closed higher on Friday, led by technology stocks, as a weaker-than-expected jobs report reduced expectations of further Fed tightening, while softer oil prices and easing rate expectations provided additional support to risk appetite.

Japan's Nikkei ended 1.0% lower on Friday, as profit-taking and global bond-market volatility weighed on sentiment, while rising Tokyo core inflation above the BOJ's 2% target heightened expectations of a tighter monetary policy stance.

Chinese financial markets will be closed from October 1-7 for the National Day holiday.

Commodities & Currency:

The Indian rupee weakened for the third consecutive session on Thursday to around ₹96/\$, pressured by a stronger dollar and elevated US Treasury yields, while suspected RBI intervention helped limit further depreciation.

Gold traded around \$4,140/oz as softer US labour-market data reduced expectations of an October Fed rate hike, supporting bullion despite continued uncertainty over the timing of further rate increases.

News:

HDFC Bank has appointed Anup Bagchi, former MD & CEO of ICICI Prudential Life, as its new MD & CEO for a three-year term from October 27, succeeding Sashidhar Jagdishan.

Shyam Metalics and Energy has signed an agreement with the Maharashtra government to invest ₹50,000 crore (\$5.19 billion) to set up a 9 MTPA greenfield integrated steel complex in Chandrapur, expected to create around 30,000 jobs, subject to approvals.

PepsiCo and Monster Beverage have challenged India's food regulator in court over the ban on using the "energy drink" label for high-caffeine beverages, citing significant financial and business impact.

Jio Platforms is expected to open its \$3.8 billion IPO for subscription on October 21, with the issue potentially becoming India's largest-ever public offering.

India's forex reserves fell \$18.34 billion to \$747.56 billion in the week ended September 25, marking the third consecutive weekly decline, amid RBI intervention to support the rupee.

Nayara Energy has raised petrol prices by ₹5/litre and diesel prices by ₹3/litre with immediate effect, citing rising international crude oil and refined-product costs amid elevated global energy prices.

Indiabulls Limited has received a Certificate of Registration from the RBI to operate as a Core Investment Company (CIC), bringing it under the central bank's regulatory framework for investment-holding entities.

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