

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	22,363.35	-157.10	-0.70	-0.26	-14.47
BSE Sensex	71,924.68	-547.65	-0.76	0.02	-15.57
Bank Nifty	54,918.00	-338.65	-0.61	0.86	-8.03
Nifty Midcap 100	58,834.55	47.25	0.08	0.17	-3.15
Nifty Smallcap 100	19,425.80	272.1	1.42	1.93	9.72
S&P 500	7,807.24	-4.30	-0.06	1.83	13.90
DJIA	51,856.18	196.00	0.38	1.05	6.76
Nasdaq 100	30,664.70	-218.45	-0.71	0.54	22.52
Nikkei 225	69,030.92	-11.19	-0.02	0.11	33.18
Hang Seng	24,271.20	59.85	0.25	1.25	-7.85
ShanghaiCom	3,797.24	-16.55	-0.43	-0.38	-5.62

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	22,363.35	54,918.00
Support	22,307 & 22,225	54,744 & 54,577
Resistance	22,572 & 22,654	55,284 & 55,451

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,583.21	14,291.69	-1,708.48
DII Cash Market	15,506.73	12,461.71	3,045.02

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Dr Reddys Labs	1229.40	2.71	1756.68
Bajaj Auto	10034.00	2.62	313.93
TMPV	284.45	1.63	9423.66
Bharat Elec	373.90	1.56	8428.54
BSE Limited	3330.20	1.31	3342.32
Top Losers			
Apollo Hospital	7775.00	-3.15	990.81
ITC	257.90	-3.05	14895.73
Tech Mahindra	1471.00	-2.85	4256.94
L&T	3627.50	-2.05	1177.48
Max Healthcare	865.95	-2.02	2033.40

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	106.80	1.99	75.80
WTI (USD/bbl)	93.79	2.11	63.63
Gold Spot (USD/t oz.)	4,164.83	-0.70	-3.87
USD/INR	95.78	1.00	6.46
10 Year G-Sec India	7.39	1.19	12.21
US 10 Year Bond	5.19	-1.05	25.65

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian benchmark indexes fell on Monday as investors assessed the Reserve Bank of India's latest measures to support the rupee, while concerns over elevated oil prices and a weaker monsoon kept risk sentiment subdued.

Global

The Nasdaq composite closed lower on Monday as oil prices jumped after attacks on a Saudi airport, and investors waited for banks to kick off the third-quarter earnings season and for economic data this week. Chinese stocks declined, as macro financial pressures and widening global geopolitical concerns overshadowed Beijing's latest interventions. According to regional market reports tracking Asian equities, China's core indices hit near one-year lows during the session.

Commodities & Currency:

The Indian rupee rose about 1% on Monday after the central bank took steps to temper dollar demand in spot and derivatives markets, with likely intervention through dollar sales adding to the gains.

Gold prices fell on Monday after hitting a one-week high earlier in the session, as a firm dollar weighed on bullion and investors braced for US inflation data that could reshape expectations for the Federal Reserve's rate path.

News:

India's retail inflation jumped to 5.54% in September, data showed on Monday, nearing the upper end of the central bank's 2%-6% tolerance band and strengthening the case for further rate hikes as the Iran war and weak monsoon-led price pressures ripple through the economy.

India's HCLTech on Monday signed a partnership Anthropic to accelerate enterprise adoption of Agentic AI with a focus on safety, cybersecurity and governance.

India turned away nearly 1.8 billion units of renewable electricity in July and August, even as it grappled with power shortages and dwindling coal stocks at power plants during a period of record electricity demand, a report showed on Monday.

Stellantis and Tata Motors Passenger Vehicles will develop vehicles for more than 50 global markets and manufacture them in India, the firms said on Monday.

Inflows into Indian equity mutual funds hit a five-month high of 383.07 billion rupees (\$4 billion) in September, driven by record monthly investments despite a market selloff and sustained foreign selling.

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India's Hatsun Agro Product expects revenue to rise as much as 50% over the next two financial years, supported by a wider milk procurement network and expansion beyond its southern Indian stronghold, Chairman RG Chandramogan told Reuters.

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