Retail Research

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Weekly Wrap

09th October 2026



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Market Review

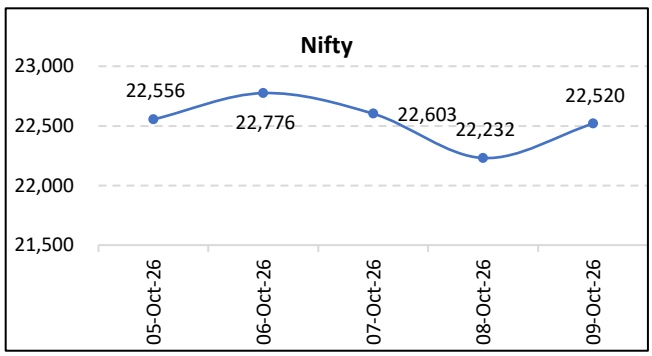
Domestic benchmark indices managed to close the week on a positive note after witnessing extreme selling pressure on persistent macroeconomic concerns which weighed heavily on investor sentiment. Sensex and Nifty closed with weekly gains of 0.8% and 0.4% respectively while broader markets continued to underperform with BSE Midcap and Smallcap losing 0.5% and 0.4% WoW respectively. Persistent aggressive selling by FIIs, weakness in Indian rupee, elevated crude oil prices and high bond yields kept Indian markets under pressure throughout the week. The Indian rupee weakened sharply against the US dollar, breaching the historic Rs 97/$ mark, amplifying the financial strain on India's import basket. Brent crude oil price remained elevated throughout the week trading above $100/bbl, supported by the ongoing supply side constraints. The US 10-year Treasury yield also stayed under a close watch during the week, lending support to the US dollar and keeping sentiment towards the emerging markets broadly cautious. During the week, FIIs net sold equities worth Rs 35,556 cr while DIIs net bought to the tune of Rs 30,314 cr.

In a widely expected outcome, RBI hiked repo rates by 25 bps to 5.5%, marking its first rate hike since Feb'23 while also shifting its policy stance from neutral to calibrated tightening. The GDP growth projection for FY27 was revised upwards by 40 bps to 7.1% aided by better-than-expected economic activities. Inflation projection was also revised upwards by 20 bps to 5.2% due to deficient monsoon and high crude oil prices.

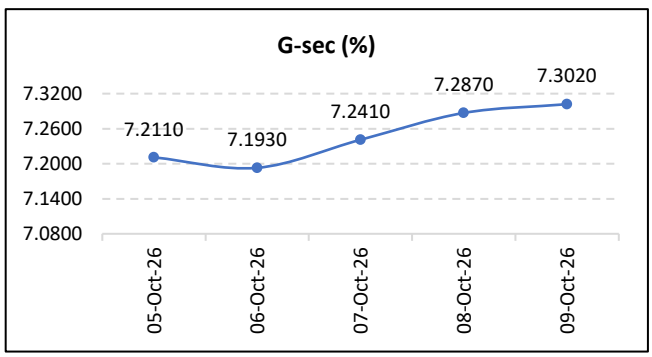
On the earnings front, the September quarter results were kickstarted by the IT bellwether TCS which reported broadly in-line set of numbers. Management remained positive on the company's medium-term growth driven by strong deal wins and rising AI adoption, though margins were guided to face near-term headwinds. Stock specific action was also seen during the week with companies reporting strong 2QFY27 provisional business updates outperforming the market. Sectorally, FMCG, Healthcare and IT closed higher by 2.4%, 1.3% and 0.8% WoW respectively while Metals and Realty led the losses by 4.2% WoW each.

Next week onwards, the September quarter earnings season is set to take the centre stage with a broader set of companies, including HCL Tech, Tata Elxsi, Wipro, Nestle, scheduled to report results. Management commentaries over the impact of the ongoing Middle East tensions, inflation mitigation strategies and overall demand environment will be key to track. On the global front, developments in energy markets, bond yields, dollar index, etc. would be closely tracked. Technically, the 22,250–22,200 zone will serve as a crucial support area for Nifty, and a decisive break below 22,200 could revive the prevailing downtrend and expose the index to further weakness. On the upside, the 22,750–22,800 zone remains a key resistance band that the index must overcome to strengthen the recovery. A sustained move above the immediate resistance band of 22,750–22,800 could pave the way for an extension towards 23,100, followed by 23,300 in the short term.

CNX Nifty



10 year Government of India Bond Yield



Indices	01-Oct	09-Oct	% Chg
Nifty	22,422.0	22,520.5	0.4
Sensex	71,909.7	72,472.3	0.8
Midcap	15,997.6	15,919.2	(0.5)
Small cap	6,909.4	6,883.2	(0.4)

Indices	01-Oct	09-Oct	% Chg
BSE FMCG	16,651.3	17,056.4	2.4
BSE Bankex	61,356.1	62,159.2	1.3
BSE IT	27,198.8	27,406.6	0.8
BSE PSU	19,298.0	19,154.0	(0.7)
BSE Cons Durab	57,809.5	57,153.3	(1.1)
BSE Cap Goods	74,133.3	73,291.7	(1.1)
BSE Oil	24,621.7	24,157.9	(1.9)
BSE Healthcare	49,899.9	48,828.0	(2.1)
BSE Auto	56,364.1	55,145.9	(2.2)
BSE Power	7,145.0	6,986.3	(2.2)
BSE Metal	39,634.3	37,979.3	(4.2)
BSE Realty	6,554.3	6,279.8	(4.2)

05 Oct - 09 Oct		
Rs in Cr	FII Inv	DII Inv
Buy	71,504.1	97,960.9
Sell	1,07,060.2	67,647.4
Net	(35,556.1)	30,313.5

Quarterly results for next week:

Key Results	Date	Key Results	Date
Avenue Supermarts	10-Oct-26	HDB Financial Services	14-Oct-26
HCL Technologies	12-Oct-26	Nestle India	15-Oct-26
ICICI Prudential AMC	12-Oct-26	Wipro	15-Oct-26
RBL Bank	12-Oct-26	Tech Mahindra	15-Oct-26
ICICI Prudential Life Insurance	13-Oct-26	Jio Financial Services	15-Oct-26
Tata Elxsi	13-Oct-26	Polycab India	15-Oct-26
Transformers and Rectifiers	13-Oct-26	HDFC Life Insurance	15-Oct-26
Bharat Heavy Electricals	14-Oct-26	LTM	16-Oct-26
Billionbrains Garage Ventures	14-Oct-26	Federal Bank	16-Oct-26
ICICI Lombard General Insurance	14-Oct-26		

Top 5 Performers – Sensex			
	Close 01-10-2026	Close 09-10-2026	% Chg
Trent	2,597.4	2,920.0	12.4
Kotak Mahindra Bank	419.8	440.1	4.8
TCS	2,079.3	2,163.0	4.0
Bharti Airtel	1,741.0	1,806.6	3.8
ICICI Bank	1,305.5	1,354.1	3.7

Top 5 Performers – Nifty			
	Close 01-10-2026	Close 09-10-2026	% Chg
Trent	2,580.0	2,918.2	13.1
BSE	3,046.0	3,287.2	7.9
Kotak Mahindra Bank	418.4	441.0	5.4
HDFC Life Insurance Company	534.2	556.7	4.2
Bharti Airtel	1,741.1	1,811.6	4.0

Top 5 Losers – Sensex			
	Close 01-10-2026	Close 09-10-2026	% Chg
Bharat Electronics	383.5	368.5	(3.9)
Tata Steel	179.1	173.6	(3.1)
Sun Pharmaceutical Industries	1,810.0	1,756.9	(2.9)
Titan	4,535.0	4,406.3	(2.8)
Asian Paints	2,406.3	2,345.0	(2.5)

Top 5 Losers – Nifty			
	Close 01-10-2026	Close 09-10-2026	% Chg
Adani Enterprises	2,816.8	2,634.4	(6.5)
Max Healthcare Institute	941.0	883.8	(6.1)
JSW Steel	1,233.0	1,168.0	(5.3)
Hindalco Industries	941.9	900.4	(4.4)
Bharat Electronics	383.1	369.2	(3.6)

Source: BSE/NSE/Bloomberg/NSDL

Global Market Update

World Indices	Country	Last Price	Valuation - P/E (x)		% Change				
			CY26E	CY27E	1W	1M	3M	6M	12M
DJIA*	USA	51,231.6	21.0	19.3	0.1	(2.2)	(2.7)	6.9	10.5
Nasdaq*	USA	27,193.3	30.8	22.4	0.0	3.6	3.5	18.7	18.1
S&P 500*	USA	7,765.4	21.5	18.5	0.6	1.7	2.5	13.9	15.3
Russell 2000*	USA	2,794.1	36.7	22.4	(1.4)	(4.4)	(6.2)	6.2	13.2
DAX*	Germany	24,807.0	16.3	14.0	(1.7)	(3.0)	(1.0)	4.2	0.8
CAC*	France	7,729.7	13.7	12.7	(2.1)	(5.2)	(7.3)	(6.4)	(3.9)
FTSE 100*	UK	10,441.6	12.4	11.8	(0.2)	(2.1)	(0.5)	(1.5)	9.8
STOXX Europe 600*	Europe	625.5	14.8	13.6	(0.9)	(2.3)	(2.4)	1.7	9.5
Nikkei	Japan	69,030.9	22.3	21.7	1.1	6.0	0.7	21.3	42.1
Hang Seng	Hong Kong	24,211.4	10.9	9.6	1.0	(4.2)	0.1	(6.5)	(9.5)
Shanghai Composite	China	3,813.8	13.6	12.1	(0.7)	(3.5)	(4.6)	(4.3)	(3.1)
KOSPI	Korea	6,625.9	6.5	4.8	(5.4)	(6.0)	(11.4)	13.1	86.7
Straits Times	Singapore	5,401.9	16.4	15.1	(4.1)	(5.7)	(1.2)	8.3	21.7
SET	Thailand	1,577.7	13.9	13.4	0.4	(2.5)	(2.7)	4.7	20.1
S&P ASX 100	Australia	7,328.9	18.0	16.9	0.5	(2.0)	(0.9)	(2.4)	(1.7)
Bovespa Brazil 50*	Brazil	2,06,220.2	9.8	9.4	7.3	11.1	15.9	4.5	45.5

* Data till 08th October 2026

Global Commodity Update

World Commodities*	Unit	Last Price	% Change				
			1W	1M	3M	6M	12M
Brent Crude	$/barrel	104.3	2.0	3.0	37.2	9.5	59.9
Natural Gas Spot	$/mmBtu	3.2	10.8	14.1	16.2	16.3	(0.1)
Coal - Newcastle	$/Ton	152.7	1.0	(1.1)	16.6	13.9	29.4
Copper LME	$/Ton	14,405.9	0.7	(2.7)	7.4	12.4	32.9
Aluminium LME	$/Ton	3,036.7	(1.6)	(10.0)	(3.2)	(14.8)	8.2
Zinc LME	$/Ton	3,774.6	0.1	(10.2)	4.0	13.6	22.7
Nickel LME	$/Ton	15,359.9	(0.5)	(8.3)	(7.2)	(9.9)	0.3
Gold	$/Troy Ounce	4,132.5	(0.2)	(6.1)	0.3	(13.0)	3.9
Silver	$/Troy Ounce	59.2	(2.0)	(12.1)	(1.2)	(22.0)	20.1
Raw Sugar	$/lb.	20.2	1.1	9.5	35.4	46.5	23.9
Cotton	$/lb.	79.9	1.3	(8.4)	(2.0)	4.0	17.0
Rubber	JPY/kg	445.0	0.9	(4.9)	7.2	17.3	47.0
Coffee Robusta	$/lb.	3,423.0	(1.3)	(0.6)	(11.6)	3.0	(25.1)
Palm Oil Malaysia Spot	$/Ton	1,145.0	2.2	(4.6)	0.4	(3.8)	1.6
Baltic Dry Index	points	2,973.0	(5.6)	(17.9)	1.0	35.1	54.6

* Data till 08th October 2026

Source: Bloomberg

Major Currency Performance vs USD

Currency Pairs USD	Last Price	% Change				
		1W	1M	3M	6M	12M
Dollar Index	102.2	0.2	3.4	1.2	3.4	2.6
USD/INR	96.7	(0.4)	(1.7)	(1.4)	(4.2)	(8.2)
USD/JPY	158.3	(0.3)	(3.0)	2.6	0.4	(3.3)
USD/EUR	0.9	0.4	3.8	2.0	4.4	3.2
USD/GBP	0.8	0.1	2.4	1.4	1.6	0.6
USD/CNY	6.7	0.2	0.2	1.5	2.1	6.6

Live Price on 9th Oct'26 at 4:00 pm

Major Currency Performance vs INR

Currency Pairs INR	Last Price	% Change				
		1W	1M	3M	6M	12M
USD/INR	96.7	(0.4)	(1.7)	(1.4)	(4.2)	(8.2)
JPY/INR	0.6	(0.3)	1.4	(3.9)	(4.6)	(4.9)
EUR/INR	108.5	0.0	1.9	0.5	(0.3)	(4.9)
GBP/INR	128.1	(0.6)	0.5	(0.1)	(3.0)	(7.2)
CNY/INR	14.5	(0.7)	(1.9)	(2.8)	(6.2)	(13.9)

Live Price on 9th Oct'26 at 4:00 pm

Source: Bloomberg



Corporate News

Tata Consultancy Services: The company reported steady growth in 2QFY27 led by BFSI and manufacturing, with broad-based international recovery. Company's revenue and PAT grew 1.3% and 0.3% QoQ to Rs 73,188 cr and Rs 13,884 cr respectively. Operating margin remained stable at 24%. AI annualized revenue crossed USD 3.1 bn (>10% of revenue) and grew 19% QoQ, while TCV remained strong at USD 9.6 bn. Management remained positive on medium-term growth supported by strong deal wins, rising AI adoption and improving client demand, though margins may face near-term headwinds.

DLF: Announced complete sell-out of The Aureva, its luxury residential project in Gurugram. The project has achieved sales of around Rs 1,985 cr, underscoring strong demand for thoughtfully curated luxury retirement living communities that seamlessly integrate luxury, wellbeing, convenience, healthcare access and meaningful community engagement.

Aurobindo Pharma: The company has received final approval from the USFDA to manufacture and market Perampanel tablets 2 mg, 4 mg, 6 mg, 8 mg, 10 mg and 12 mg in the US. The product is expected to be launched in 3QFY27. Perampanel tablets are indicated for the treatment of partial-onset seizures with or without secondarily generalised seizures in patients with epilepsy aged 4 years and older.

HDFC Bank: The bank appointed Anup Bagchi as its Managing Director & CEO for the period of 3 years.

JSW Energy: The company has added 1,694 MW of installed capacity since Apr'26, including around 1.4 GW of renewable capacity. Consequently, the company's total installed capacity has increased to 15,147 MW.

Narayana Hrudayalaya: Commenced commercial operations of the 110-bed KS-Narayana Hospital in Bengaluru under an earlier O&M agreement while also entering into a long-term agreement to operate and manage the 100-bed Mission of Mercy Hospital & Research Centre in Kolkata. These additions expand Narayana Health's managed hospital network without significant capital deployment and are expected to support its presence in key healthcare markets.

Sunteck Realty: The company's subsidiary acquired a 4.5-acre land parcel in Borivali West, Mumbai.

Source: BSE/NSE/Economic Times/NDTV Profit/Business Line/Business Standard/Financial Express/Money Control

Voltamp Transformers: Commenced commercial production at Vadodara unit for manufacturing power transformers.

Tata Power Company: Partnered with Norway-based renewable energy technology company Ocean Sun to bring its innovative membrane-based floating solar technology to India. The collaboration will see Tata Power and Ocean Sun undertake a 300-kWp floating solar pilot project at Tata Power's Mulshi reservoir in Maharashtra.

TD Power Systems: The company opened a QIP of equity shares at a floor price of Rs 775.35 per share (~5% discount to CMP). TD Power Systems may offer a discount of up to 5% on the floor price. This would put the potential discounted price at about Rs 736.58 per share.

Hexaware Technologies: Announced a multi-year partnership with Anthropic, becoming a preferred partner in Anthropic's Claude Partner Network. The partnership will integrate Claude into two of Hexaware's platforms: Zerovity, an AI-native engineering platform, and AgentVerse, an agent-building and governance platform featuring more than 600 pre-built agents.

Lupin: Received US FDA approval for its Abbreviated New Drug Application (ANDA) for Phytonadione Injectable Emulsion USP, 1 mg/0.5 mL, in a single-dose prefilled syringe. Phytonadione Injectable Emulsion is indicated for the treatment and prevention of hypoprothrombinemia (reduced blood-clotting ability) and vitamin K deficiency. The drug recorded estimated annual sales of USD 52.3 mn in the US, according to IQVIA MAT data for Aug'26.

Source: BSE/NSE/Economic Times/NDTV Profit/Business Line/Business Standard/Financial Express/Money Control



Domestic & Global Economic Update



RBI hikes repo rates by 25 bps: The RBI's MPC decided to unanimously hike repo rate by 25 bps to 5.5%, first rate hike since Feb'23. Stance changed from neutral to calibrated tightening, a stance used by the regulator for the first time since Oct'18, effectively ruling out near-term rate cuts. The GDP growth projection for FY27 was revised upwards by 40 bps to 7.1% aided by resilient domestic demand and better-than-expected economic growth in 1HFY27. Inflation projection for FY27 was also raised by 20 bps to 5.2% amid pressures such as deficient monsoon, El Nino conditions and volatile crude oil prices. Real GDP grew 7.8% YoY in 1QFY27, maintaining the pace recorded in the preceding quarter, while nominal GDP growth accelerated to a five-quarter high of 10.3%. This growth was supported by strong growth in financial, real estate and professional services at 12.1%, manufacturing at 9.2%, and electricity and utilities at 8.9%.

India's Services PMI rises in Sep'26: India's PMI rose to 55.2 in Sep'26 from 54.1 in Aug'26, but was below a preliminary estimate of 55.8. A reading above 50.0 shows growth. September's improvement failed to prevent the Jul-Sep average from falling to its lowest since the quarter ended Mar'22, painting a less upbeat picture as hiring softened and export momentum weakened. New business - a key gauge of demand - increased at its quickest pace since June. But international demand was less buoyant with export order growth slowing to its weakest in nearly three years, suggesting domestic customers provided a firmer foundation for September's acceleration. Employment growth eased from Aug'26, business confidence improved to a three-month high but remained subdued historically.



Source: BSE/NSE/Economic Times/NDTV Profit/Business Line/Business Standard/Financial Express/Money Control



Order Inflows during the week

Date	Company	Mcap (Rs cr)	Order Size (Rs cr)	Client	Execution span
05-10-2026	Larsen & Toubro	5,08,957	10,000 to 15,000	-	-
07-10-2026	Larsen & Toubro	5,08,957	10,000 to 15,000	DVC VIL Power Pvt Ltd	-
06-10-2026	Container Corporation of India	33,622	87.2	-	-
09-10-2026	BEML	15,700	75.6	-	-
07-10-2026	Welspun Enterprises	10,201	66.0	NDMC	-
08-10-2026	KEC International	9,841	1,030.0	-	-
08-10-2026	Waaree Renewable Technologies	8,397	5*	-	12 Months
05-10-2026	Railtel Corporation of India	7,988	48.4	Odisha Education Department	03-04-2027
08-10-2026	Railtel Corporation of India	7,988	63.8	Northern Coalfields	30-10-2031
08-10-2026	NCC	7,854	1,286.0	Hyderabad Growth Corridor	18 Months
07-10-2026	Dilip Buildcon	6,434	1,800.0	Petroleum and Natural Gas Regulatory Board	36 Months
06-10-2026	Shakti Pumps	5,191	112.2	MSEDCL, Maharashtra	60 Days
08-10-2026	Dee Development Engineers	4,575	55.0	-	Aug'27
06-10-2026	Interarch Building Solutions	2,851	61.0	-	12 Months
08-10-2026	Interarch Building Solutions	2,851	59.0	-	10 Months
08-10-2026	EMS	1,770	129.8	Jodhpur Muncipal Corporation	24 Months
07-10-2026	Silver Touch Technologies	1,666	35.6	ITI Ltd	6 Months
08-10-2026	Shree Refrigeration	1,329	7.9	Indian Navy	05-10-2027
09-10-2026	Subex	1,083	0.7**		3 Years

* In MWp | ** USD Mn | Source: BSE



Macro Economic Event Calendar

Country	Macro Economic Event Calendar	Previous	Forecast
12th October 2026			
IND	Sep'26 CPI Inflation YoY	4.8%	4.9%
13th October 2026			
USA	Sep'26 Exisiting Home Sales MoM	-2.0%	-0.3%
14th October 2026			
IND	Sep'26 WPI Inflation YoY	9.9%	12.0%
USA	Sep'26 CPI Inflation MoM	0.4%	0.5%
USA	Sep'26 Core CPI Inflation MoM	0.3%	0.2%
CNY	Sep'26 CPI Inflation YoY	0.8%	0.9%
CNY	Sep'26 PPI Inflation YoY	3.8%	3.8%
CNY	Sep'26 Balance of Trade (USD Bn)	119.1	105.0
CNY	Sep'26 Exports YoY	25.0%	-
15th October 2026			
IND	Sep'26 Balance of Trade (USD Bn)	-43.8	-29.5
USA	Sep'26 PPI MoM	0.4%	0.5%
USA	Sep'26 Core PPI MoM	0.2%	0.3%
USA	Weekly Initial Jobless Claims	197k	201k
16th October 2026			
USA	Sep'26 Exports Prices MoM	0.6%	0.7%
USA	Sep'26 Import Prices MoM	0.7%	0.8%
USA	Sep'26 Industrial Production MoM	0.0%	0.1%
EUR	Aug'26 Balance of Trade (EUR Bn)	14.2	14.7

Country / Organisation	
IND	India
USA	United States of America
CNY	China
GBP	United Kingdom
EUR	European Union
JPY	Japan

Source: Bloomberg



Insider trades during the week

Company Name	CMP* (Rs)	Mcap (Rs cr)	Net Buy/Sell	Net Quantity	Net Value (Rs cr)	Net % Traded	Latest Promoter holding
Innova Captab Ltd	1,111.9	6,362.6	Sell	18,00,000	194.41	3.14%	50.9
Lords Mark Industries Ltd	79.5	3,391.7	Sell	89,98,598	76.18	2.11%	79.8
Info Edge (India) Ltd	1,215.8	78,835.0	Sell	5,04,582	68.61	0.07%	37.5
Symbiotec Pharmalab Ltd	1,087.0	6,984.6	Sell	1,02,070	11.88	0.17%	33.3
Embassy Developments Ltd	55.4	7,697.2	Buy	3,48,500	1.99	0.03%	42.7
Dindigul Farm Product Ltd	30.9	75.5	Sell	4,48,000	1.27	1.84%	59.5
Shankara Building Products Ltd	117.9	285.9	Sell	77,042	1.16	0.32%	45.4
Hy-Tech Engineers Ltd	90.1	854.9	Buy	1,46,150	0.98	0.18%	71.2
Gajanan Securities Services Ltd	51.0	15.8	Buy	1,31,181	0.56	4.23%	71.2
Sangam India Ltd	605.0	3,039.9	Sell	4,625	0.28	0.01%	70.5
Travel Food Services Ltd	1,187.0	15,633.3	Sell	1,778	0.22	0.00%	86.2
Ravindra Energy Ltd	140.9	2,796.8	Sell	13,500	0.20	0.01%	58.3
Lakshmi Engineering And Warehousing Ltd	2,399.0	160.4	Buy	655	0.16	0.10%	37.6
Bhartiya International Ltd	1,040.6	1,395.5	Buy	1,547	0.15	0.00%	61.2
Kitex Garments Ltd	115.1	2,296.2	Buy	11,650	0.14	0.01%	56.7
Simmonds Marshall Ltd	223.8	250.7	Buy	5,000	0.12	0.05%	59.7
Reganto Enterprises Ltd	4.2	61.3	Sell	1,78,631	0.06	0.12%	61.9
W. S. Industries (India) Ltd	52.6	399.3	Buy	9,000	0.05	0.02%	51.7
Deepak Spinners Ltd	143.9	103.5	Buy	2,933	0.04	0.04%	46.7
Anand Rayons Ltd	34.9	76.5	Buy	10,377	0.04	0.05%	53.6
Nicco Parks & Resorts Ltd	76.5	358.0	Buy	4,004	0.03	0.00%	69.6
Olatech Solutions Ltd	58.5	26.0	Sell	4,625	0.03	0.10%	62.7
Triveni Glass Ltd	7.0	8.9	Buy	15,000	0.01	0.12%	5.5
Alufluoride Ltd	678.0	530.2	Buy	93	0.01	0.00%	59.9
Visaka Industries Ltd	83.9	724.6	Buy	115	0.00	0.00%	53.4
Tirupati Foam Ltd	73.5	32.4	Sell	7,712	0.00	0.17%	71.7
Harshdeep Hortico Ltd	90.0	144.8	Buy	1,500	0.00	0.01%	73.0

**Current market price is live price as on 09th Oct'26*
Source: BSE, SSL Research
Kindly note: Data pertains to exchange filings under Promoters, Promoter group and Immediate relative categories.



Key Bulk and Block Deals

(For companies above Rs 1,000 cr Market Cap)

NSE Bulk Deals

Date of Deal	Company Name	Client Name	Buy/ Sell	Price (Rs)	Quantity Traded	% Traded
07-10-2026	ONE MOBIKWIK SYSTEMS	HARA GLOBAL CAPITAL MASTER FUND I LTD	BUY	260.0	7,00,000	0.9%
07-10-2026	RATNAVEER PRECISION	THAKKAR NILESHKUMAR FARSHURAM HUF	SELL	340.8	8,00,000	1.0%
07-10-2026	SHREEJI SHIPPING GLOBAL	MOHAMED IRFAN MOHAMED LATIF SHAIKH	SELL	802.5	12,27,000	0.8%
08-10-2026	EIMCO ELECON	ENIGMA SMALL OPPORTUNITIES FUND	BUY	2,221.2	47,141	0.8%
08-10-2026	GUJARAT NATURAL RESOURCES	ACHINTYA SECURITIES LTD	SELL	95.0	10,00,000	0.7%
08-10-2026	INDEGENE	PI OPPORTUNITIES AIF V LLP	BUY	590.0	20,18,426	0.8%
08-10-2026	INDEGENE	PIONEER INVESTMENT FUND SCHEME II	SELL	590.0	20,18,426	0.8%
08-10-2026	INOX GREEN ENERGY	ABHISHEK KHAITAN	SELL	112.3	35,85,000	0.9%
08-10-2026	KAJARIA CERAMICS	PI OPPORTUNITIES AIF V LLP	BUY	1,211.0	11,28,464	0.7%
08-10-2026	KAJARIA CERAMICS	PIONEER INVESTMENT FUND SCHEME II	SELL	1,211.0	11,28,464	0.7%

NSE Block Deals

Date of Deal	Company Name	Client Name	Buy/ Sell	Price (Rs)	Quantity Traded	% Traded
08-10-2026	INDEGENE	PI OPPORTUNITIES AIF V LLP	BUY	590.0	20,18,426	0.8%
08-10-2026	INDEGENE	PIONEER INVESTMENT FUND SCHEME II	SELL	590.0	20,18,426	0.8%
08-10-2026	KAJARIA CERAMICS	PI OPPORTUNITIES AIF V LLP	BUY	1,211.0	11,28,464	0.7%
08-10-2026	KAJARIA CERAMICS	PIONEER INVESTMENT FUND SCHEME II	SELL	1,211.0	11,28,464	0.7%

BSE Bulk Deals

Date of Deal	Company Name	Client Name	Buy/ Sell	Price (Rs)	Quantity Traded	% Traded
06-10-2026	POLYPLEX CORPORATION	SECURE INVESTMENTS LTD	BUY	1,040.0	6,07,000	1.9%
06-10-2026	POLYPLEX CORPORATION	BHILANGANA HYDRO POWER LTD	SELL	1,040.0	6,07,000	1.9%
08-10-2026	ITC	GOLDMAN SACHS TRUST IIGOLDMAN SACHS GQG PARTNERS INTL OPPORTUNITIES FUND	SELL	257.4	19,40,29,943	1.6%

BSE Block Deals

Date of Deal	Company Name	Client Name	Buy/ Sell	Price (Rs)	Quantity Traded	% Traded
06-10-2026	POLYPLEX CORPORATION	SECURE INVESTMENTS LTD	BUY	1,040.0	6,07,000	1.9%
06-10-2026	POLYPLEX CORPORATION	BHILANGANA HYDRO POWER LTD	SELL	1,040.0	6,07,000	1.9%
08-10-2026	ITC	FIDELITY ADVISOR SERIES VIII- FIDELITY ADVISOR OVERSEAS FUND	BUY	257.4	13,40,00,000	1.1%
08-10-2026	ITC	ICICI PRUDENTIAL MUTUAL FUND	BUY	257.4	9,40,11,074	0.8%
08-10-2026	ITC	GQG PARTNERS EMERGING MARKETS EQUITY FD A SERIES OF GQG PARTNERS SERIES LLC	SELL	257.4	36,50,84,221	2.9%

Source: Stock Exchange filings, SSL Research | Above list consists of only key bulk & block deals and is not exhaustive.



Technical Desk

Nifty Chart



Relief Rally or Trend Reversal?

The benchmark index Nifty has snapped its eight-week losing streak, its longest weekly losing streak since 2001, by ending the week with a modest gain of 0.44%. The index formed a Doji candlestick on the weekly chart, while the daily chart witnessed the formation of a Bullish Harami pattern. Notably, both formations have emerged near a crucial support confluence comprising the 200-week EMA and the lower trendline of the rising channel. With multiple reversal signals emerging near a critical support zone, the key question is whether the bears are finally losing their grip?

While these formations offer early signs of stabilisation, they need confirmation through follow-up bullish momentum over the next couple of trading sessions to establish the possibility of a sustained reversal. Despite the recent pullback, the index continues to trade below its key moving averages, while momentum indicators and oscillators largely reflect a sideways bias. That said, bullish crossovers on the daily RSI and Stochastic indicators suggest that the immediate downside may remain limited. The improving short-term momentum offers some relief, but the recovery still faces a crucial test before it can gain credibility.

The upcoming support and resistance levels will play a decisive role in determining the index's next move. The 22200–22250 zone will serve as a crucial support area, and a decisive break below 22200 could revive the prevailing downtrend and expose the index to further weakness. On the upside, the 22750–22800 zone remains a key resistance band that the index must overcome to strengthen the recovery.

A sustained move above the immediate resistance band of 22750–22800, particularly above 22800, could pave the way for an extension towards 23100, followed by 23300 in the short term. Ultimately, the next few trading sessions will reveal whether Nifty is preparing for a meaningful rebound or merely pausing before its next decisive move.



Corporate Action

Dividend

Company Name	Ex-Date	Div %	DPS (Rs)	FV (Rs)	CMP (Rs)	Type	Div. Yield (%)
Tata Consultancy Services Ltd.	14-Oct-26	1200	12.0	1.0	2075.3	Interim	0.6%
Vedanta Ltd.	14-Oct-26	500	5.0	1.0	253.1	Interim	2.0%

Open Offer

Company Name	Start Date	Close Date	Offer Price (Rs)	Acquisition (No. of Shares)	CMP (Rs)	Last Traded Date
Kuber Udyog Ltd.	01-Oct-26	15-Oct-26	23.4	3,19,71,680	63.3	08-Oct-26
Pasupati Fincap Ltd.	01-Oct-26	15-Oct-26	12.0	12,22,000	28.7	08-Oct-26
ACI Infocom Ltd.	05-Oct-26	16-Oct-26	1.5	3,70,47,634	2.4	08-Oct-26
Premier Explosives Ltd.	12-Oct-26	26-Oct-26	705.7	1,39,77,911	688.6	08-Oct-26
RGF Capital Markets Ltd.	13-Oct-26	27-Oct-26	1.1	3,90,06,240	2.5	08-Oct-26
South India Paper Mills Ltd.	13-Oct-26	27-Oct-26	120.0	48,75,000	116.0	08-Oct-26
Kronox Lab Sciences Ltd.	15-Oct-26	29-Oct-26	157.3	95,70,000	200.5	08-Oct-26
AAR Shyam India Investment Co Ltd.	16-Oct-26	30-Oct-26	15.0	58,43,327	15.0	11-Aug-26
Kenrik Industries Ltd.	22-Oct-26	04-Nov-26	10.0	32,49,454	12.3	08-Oct-26
Tribhovandas Bhimji Zaveri Ltd.	26-Oct-26	06-Nov-26	249.6	1,72,70,845	567.8	08-Oct-26
Niks Technology Ltd.	03-Nov-26	17-Nov-26	136.0	23,16,964	335.7	08-Oct-26
Mayur Leather Products Ltd.	09-Nov-26	23-Nov-26	27.9	12,57,048	38.5	08-Oct-26
GSL Securities Ltd.	11-Nov-26	25-Nov-26	42.0	11,11,526	64.7	05-Oct-26
Oscar Global Ltd.	18-Nov-26	02-Dec-26	10.0	18,53,096	22.7	05-Oct-26

Source: ACE Equity, Exchange Fillings

Stock Split

Company Name	Ex-date/ Record Date	FV Before Split (Rs)	FV After Split (Rs)	Comment
AvenuesAI Ltd.	13-Oct-26	1.0	10.0	Reverse Split
Samor Reality Ltd.	15-Oct-26	10.0	2.0	-
Bansal Wire Industries Ltd.	16-Oct-26	5.0	1.0	-
Noble Polymers Ltd.	16-Oct-26	5.0	10.0	Reverse Split
JSW Dulux Ltd.	22-Oct-26	10.0	1.0	-
Azad India Mobility Ltd.	23-Oct-26	10.0	2.0	-
Midaas Fashions Ltd.	26-Oct-26	10.0	5.0	-
Meenakshi India Ltd.	30-Oct-26	10.0	5.0	-
Galaxy Agrico Exports Ltd.	30-Oct-26	10.0	1.0	-

Bonus

Company Name	Record/Ex-Bonus Date	Ratio
JOJO Ltd.	12-Oct-26	1:1 (1 Bonus share for every 1 share held)
Oneclick Logistics India Ltd.	15-Oct-26	1:2 (1 Bonus share for every 2 shares held)

Rights Issue

Company Name	Ex/Record Date	Ratio	Offer Price (Rs.)	FV (Rs)	CMP (Rs)	Last Traded Date
OLA Electric Mobility Ltd.	13-Oct-26	2:25	27.0	10.0	34.5	08-Oct-26
Shraddha Prime Projects Ltd.	15-Oct-26	3:20	160.0	10.0	159.6	08-Oct-26
Shivam Autotech Ltd.	15-Oct-26	19:25	12.0	2.0	18.2	08-Oct-26

Buyback Offer - Upcoming

Company Name	Record date	Face Value (Rs)	Market Type	CMP (Rs)	Buyback Price (Rs)	Buyback Amount (Rs Cr)
N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

Buyback Offer - Ongoing

Company Name	Issue Open Date	Offer Closing Date	Face Value (Rs)	Market Type	CMP (Rs)	Buyback Price (Rs)	Buyback Amount (Rs Cr)
N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

Source: ACE Equity, Exchange Fillings

Upcoming Board Meetings & Agenda

Company Name	Board Meeting Date	Agenda
Akme Fintrade (India) Ltd.	10-Oct-26	Fund Raising
Viviana Power Tech Ltd.	10-Oct-26	Fund Raising
Amba Auto Sales and Services Ltd.	11-Oct-26	Fund Raising
CKK Retail Mart Ltd.	12-Oct-26	Bonus
Elitecon International Ltd.	12-Oct-26	Fund Raising
HCL Technologies Ltd.	12-Oct-26	Interim Dividend
Hindustan Composites Ltd.	12-Oct-26	Interim Dividend
ICICI Prudential Asset Management Company Ltd.	12-Oct-26	Interim Dividend
Jubilant Pharmova Ltd.	12-Oct-26	Fund Raising
Naturite Agro Products Ltd.	12-Oct-26	Fund Raising
Paramount Cosmetics (India) Ltd.	12-Oct-26	Fund Raising
Sun Pharmaceutical Industries Ltd.	12-Oct-26	Fund Raising
Anlon Healthcare Ltd.	13-Oct-26	Fund Raising
Shalibhadra Finance Ltd.	13-Oct-26	Right Issue of NCD
Elecon Engineering Company Ltd.	14-Oct-26	Interim Dividend
HDB Financial Services Ltd.	14-Oct-26	Interim Dividend
ICICI Lombard General Insurance Company Ltd.	14-Oct-26	Interim Dividend
Indus Finance Ltd.	14-Oct-26	Bonus issue
360 One Wam Ltd.	15-Oct-26	Interim Dividend
Angel One Ltd.	15-Oct-26	Interim Dividend
Indian Railway Finance Corporation Ltd.	15-Oct-26	Interim Dividend
Tech Mahindra Ltd.	15-Oct-26	Interim Dividend & Bonus issue

Company Name Change

Date of Announcement	Old Name	New Name
05-Oct-26	PVP Ventures Ltd	Evervie Health Ltd
06-Oct-26	AVAX Apparels and Ornaments Ltd	AVAX Ltd
08-Oct-26	Shree Marutinandan Tubes Ltd	Shree Marutinandan Industries Ltd

Source: ACE Equity, Exchange Fillings

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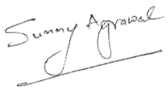
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