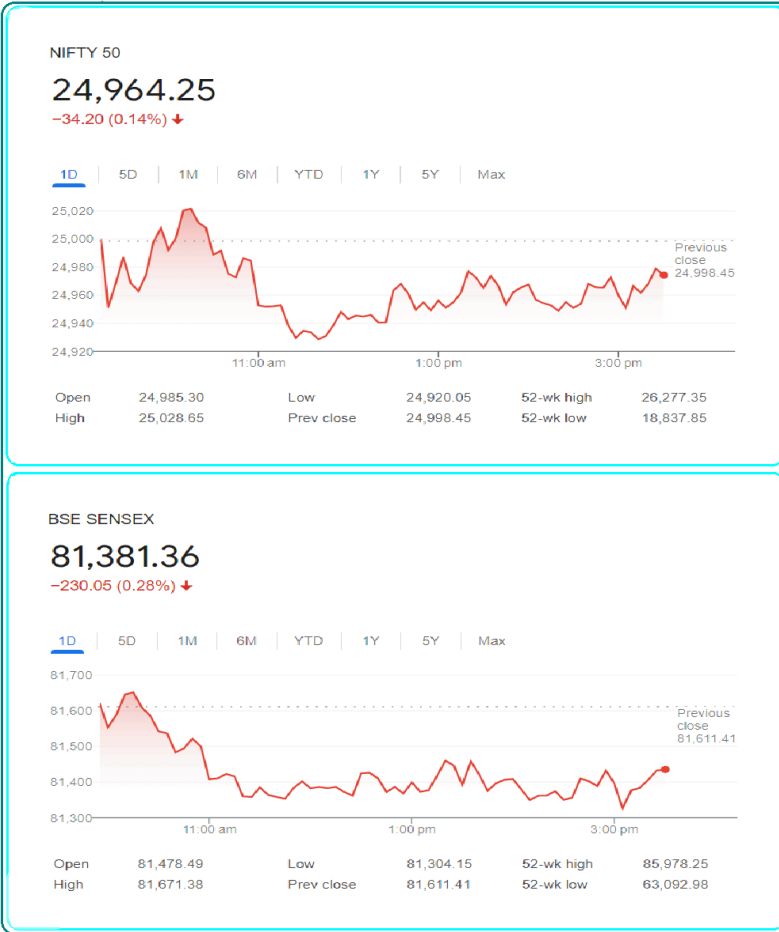


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24964.25	24998.45	<b>-0.14%</b>
<b>S&amp;P BSE SENSEX</b>	81381.36	81611.41	<b>-0.28%</b>
<b>NIFTY MID100</b>	59212.70	58935.85	<b>0.47%</b>
<b>NIFTY SML100</b>	19008.80	18900.00	<b>0.58%</b>

(Source: [NSE](#), [BSE](#))

## Sectoral Indices

Indices	Close	Previous	Change(%)
<b>NIFTY BANK</b>	51172.30	51530.90	<b>-0.70%</b>

## Market Wrap Up

- The key equity indices ended with limited losses. The Nifty closed below the 25,000 level.
- The S&P BSE Sensex was down 230.05 points or 0.28% to 81,381.36. The Nifty 50 index lost 34.20 points or 0.14% to 24,964.25.
- The S&P BSE Mid-Cap index rose 0.44% and the S&P BSE Small-Cap index added 0.44%.
- Among the sectoral indices, the Nifty Pharma index (up 1.19%), the Nifty Metal index (up 0.88%) and the Nifty Healthcare index (up 0.88%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Bank index (down 0.70%), the Nifty Realty index (down 0.69%) and the Nifty Financial Services index (down 0.64%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **October** series futures witnessed an unwinding of **short** position build up. Open Interest has been decreased by **2944** contracts at the end of the day.
- **Long** position build up for the **October** series has been witnessed in **LT, INFY, TATASTEEL**.
- **Short** position build up for the **October** series has been witnessed in **ITC, CIPLA, BERGEPAINT**.
- **Unwinding** position for the **October** series has been witnessed in **RELIANCE, ONGC, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.

(Source: Capitaline F&O)

NIFTY AUTO	26436.60	26528.50	-0.35%
NIFTY FMCG	62080.20	62056.30	0.04%
NIFTY IT	42335.70	42088.80	0.59%
NIFTY METAL	9932.70	9839.95	0.94%
NIFTY PHARMA	23582.25	23305.15	1.19%
NIFTY REALTY	1040.60	1047.85	-0.69%
BSE CG	71579.87	71507.19	0.10%
BSE CD	65606.03	65276.95	0.50%
BSE Oil & GAS	30158.46	29966.87	0.64%
BSE POWER	8419.75	8451.90	-0.38%

(Source: [NSE](#), [BSE](#))

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39605.80	39380.89	0.57%
HANG SENG	CLOSED	21251.98	-
STRAITS TIMES	3573.76	3585.29	-0.32%
SHANGHAI	3217.74	3301.93	-2.55%
KOSPI	2596.91	2599.16	-0.09%
JAKARTA	7520.60	7480.08	0.54%
TAIWAN	22901.64	22659.08	1.07%
KLSE COMPOSITE	1633.55	1640.94	-0.45%
ALL ORDINARIES	8491.50	8498.70	-0.08%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	81980.59	93973.46
NSE F&O	10924577.67	43290869.42

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4162.66

(Source: [NSE](#))

## Corporate News

- **TCS's** Q2 FY25 consolidated net profit declined over 1% QoQ to Rs 11,909 crore. Revenue from operations increased by 2.6% to Rs 64,259 crore.
- **Tata Elxsi Ltd** reported a 15% rise in its second-quarter profit on October 10. The company's net profit rose to Rs 229 crore year-on-year for the quarter ended Sept. 30. Revenue from operations rose 8% to Rs 955 crore.
- **Indian Renewable Energy Development Agency** posted a 36% year-on-year (YoY) increase in profit after tax (PAT) for the second quarter ended September 30, 2024 to Rs 387.75 crore. It had reported a net profit of Rs 284.73 crore during the July-September period of preceding 2023-24 fiscal, the company said in an exchange filing. In the June quarter, the state-owned company reported net profit of Rs 383.69 crore. The total income from operations increased to Rs 1,630.38 crore in the reporting period from Rs 1176.96 crore a year ago, a rise of 38.52%.
- **Anand Rathi Wealth Limited** reported a consolidated net profit of Rs 76 crore, up 32% YoY for the quarter ended September 30, 2024. Revenue for the quarter also increased 32% for the same period on an annual basis. For the quarter, the company reported that mutual fund distribution revenue increased 70% YoY to Rs 195 crore. Net inflows for the same period grew 128% YoY to Rs 5,700 crore. The Board of Directors declared an interim dividend of Rs 7 per equity share.
- **Den Networks** reported 13.94% increase in consolidated net profit to Rs 52.05 crore in Q2 FY25 as against 45.68 crore posted in Q2 FY24. Revenue from operations fell 9.95% year on year (YoY) to Rs 249.08 crore in Q2 FY25.
- **Jindal Power, Vedanta,** and Sanjiv Goenka-promoted **CESC** are among eight companies in the fray to acquire Hiranmaye Energy, a Kolkata-based thermal power producer. Lenders are set to auction the assets of the company in mid-October. They have set a reserve price of Rs. 1,300 crore.
- **Zydus Lifesciences** has received the USFDA's final approval to produce a generic version of Paliperidone extended-release tablets, which are used to treat schizophrenia and schizoaffective disorders. The approval covers strengths of 1.5 mg, 3 mg, 6 mg, and 9 mg, with

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TRENT	8234.95	8028.85	2.57%
HINDALCO	747.35	730.15	2.36%
HCLTECH	1839.65	1808.65	1.71%
TECHM	1647.05	1619.70	1.69%
ONGC	292.55	288.75	1.32%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
M&M	3134.35	3194.30	-1.88%
TCS	4149.20	4227.40	-1.85%
ICICIBANK	1223.00	1243.50	-1.65%
CIPLA	1595.75	1618.90	-1.43%
MARUTI	12776.65	12944.10	-1.29%

(Source: [Moneycontrol](#))

production set at the SEZ facility in Ahmedabad.

- **Alkem Laboratories** said it has entered into a licensing agreement with US-based Sonnet BioTherapeutics Holdings to develop, manufacture and commercialise a new drug candidate 'SON-080' for treatment of diabetic peripheral neuropathy in India.
- **Mazagon Dock Shipbuilders** said that the Maharashtra State Power Generation Company has placed an order with the company for Rs. 121.7 Crore.
- **Ahluwalia Contracts (India)** said that it has secured a construction order from DLF City Centre worth Rs 1,094.67 crore.
- **Ashoka Buildcon** announced that it has been declared as the lowest (L-1) bidder by Brihanmumbai Municipal Corporation (BMC) for a project worth Rs 918 crore.
- **Bondada Engineering** has received letter of award (LoA) from Maharashtra State Power Generation Company (MAHAGENCO) for bulk work orders aggregating to Rs 1,132.25 crore.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

## Global News

- U.S. initial jobless claims climbed to 258,000 in the week ended October 5th, an increase of 33,000 from the previous week's unrevised level of 225,000. Continuing claims climbed by 42,000 to 1.861 million in the week ended September 28th.
- U.S. consumer price index rose by 0.2% in September, matching the increases seen in August and July. Core consumer prices climbed by 0.3% for the second consecutive month. The annual rate of consumer price growth slowed to 2.4% in September from 2.5% in August. The annual rate of core consumer price growth accelerated to 3.3% in September from 3.2% in August.
- U.K. economy expanded 0.2% mom in August 2024, after showing no growth in both July and June. Services edged up 0.1% (vs 0.1% in July). Considering the three months to August, the GDP in the UK expanded 0.2%.
- U.K.'s trade deficit narrowed to EUR 0.96 billion in August 2024, down from a downwardly revised EUR 4.71 billion in July. Imports remained nearly unchanged at EUR 74.63 billion, while exports grew by 5.4% to EUR 73.68 billion.
- U.K. industrial production rose 0.5% month-over-month in August 2024, rebounding from a downwardly revised 0.7% fall in the previous month. On a yearly basis, industrial activity dropped 1.6% in August, cooling from an upwardly revised

2.2% decline in the preceding month.

- U.K. manufacturing production in the UK rose 1.1% month-over-month in August 2024, rebounding from an upwardly revised 1.2% drop in the previous month. On a yearly basis, manufacturing production dropped 0.3% in August, easing from an upwardly revised 2% decline in the previous month.
- Germany's consumer price inflation registered an annual increase of 1.6% in September, slower than the 1.9% rise in August. On a monthly basis, consumer prices remained flat in September.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

## Economic News

- Crude Oil traded at US\$ 75.90/bbl (IST 17:00).
- INR weakened to Rs. 84.10 from Rs. 83.98 against each US\$ resulting in daily change of 0.14%.
- India's palm oil imports in September dropped over 33% from August, totaling 527,314 metric tons, according to the Solvent Extractors' Association of India (SEA). Soy oil imports also fell by 15.4% to 384,382 tons, while sunflower oil imports decreased by 46.2% to 152,803 tons. Overall, total vegetable oil imports declined by more than 30% to 1.1 million tons.

(Source: [Economic Times](#), [Business Standard](#))

## Forthcoming Events

### Board Meetings as on 12/10/2024

Avenue Supermarts Limited	Financial Results
Network18 Media & Investments Limited	Financial Results

### Board Meetings as on 14/10/2024

Reliance Industries Limited	Financial Results
HCL Technologies Limited	Financial Results/Dividend
Angel One Limited	Financial Results
Easy Trip Planners Limited	Bonus
Exxaro Tiles Limited	Stock Split
Gopal Snacks Limited	Financial Results/Dividend
Oriental Hotels Limited	Financial Results
Alok Industries Limited	Financial Results

Sterling and Wilson Renewable Energy Limited  
Wealth First Portfolio Managers Limited

Financial Results  
Financial Results/Dividend

### Corporate Actions as on 14/10/2024

Edvenswa Enterprises Ltd

Right Issue of Equity Shares

(Source: NSE)

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