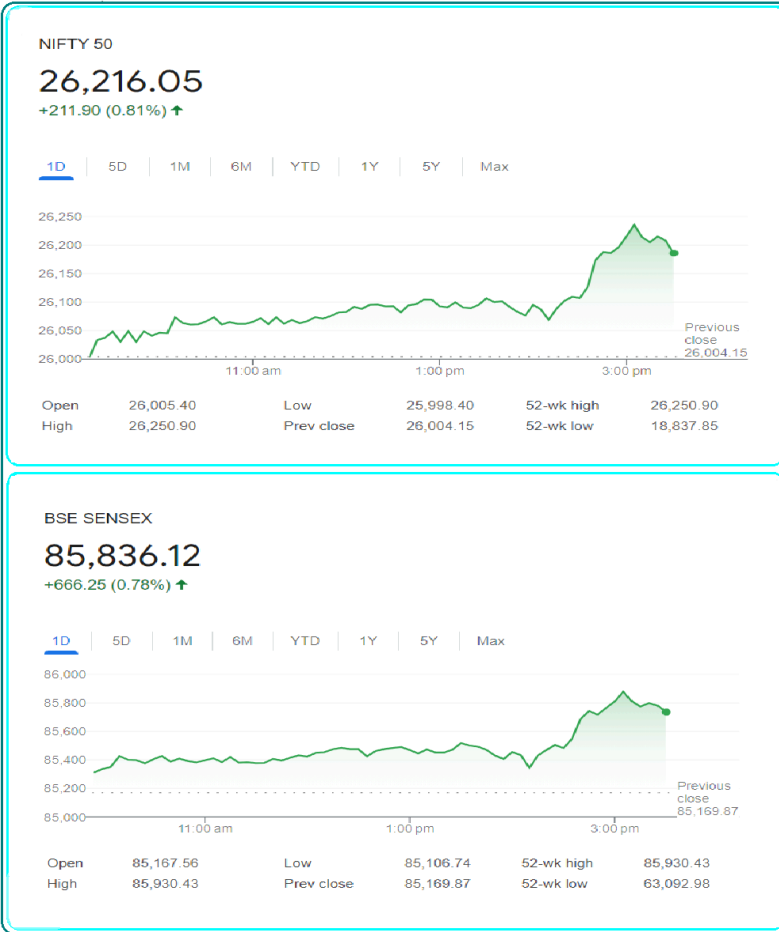


Index Chart



(Source: [Bloomberg](#))

Market Wrap Up

- The domestic equity benchmarks experienced major gains amid monthly F&O expiry. The Nifty closed above the 26,200 level.
- The S&P BSE Sensex gained 666.25 points or 0.78% to 85,836.12. The Nifty 50 index advanced 211.90 points or 0.81% to 26,216.05.
- The Sensex and Nifty clocked an all-time high of 85,930.43 and 26,250.90, respectively in late trade.
- The S&P BSE Mid-Cap index shed 0.01% and the S&P BSE Small-Cap index fell 0.39%. The market breadth was negative.
- Among the sectoral indices, the Nifty Auto index (up 2.26%), the Nifty Metal index (up 2.13%) and the Nifty PSU bank index (up 1.02%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Consumer Durables Index (down 0.90%), the Nifty Midsmall Healthcare Index (down 0.33%) and the Nifty oil & gas index (up 0.29%), underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **October** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **209955** contracts at the end of the day.
- **Long** position build up for the **October** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK, INFY, ITC**.
- **Short** position build up for the **October** series has been witnessed in **LT, HDFCBANK**.

(Source: Capitaline F&O)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	26216.05	26004.15	0.81%
S&P BSE SENSEX	85836.12	85169.87	0.78%
NIFTY MID100	60469.15	60465.15	0.01%
NIFTY SML100	19261.30	19357.75	-0.50%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54375.35	54101.65	0.51%

NIFTY AUTO	27496.25	26888.35	2.26%
NIFTY FMCG	66156.90	65521.70	0.97%
NIFTY IT	42160.90	41960.95	0.48%
NIFTY METAL	9985.70	9777.15	2.13%
NIFTY PHARMA	23250.90	23249.00	0.01%
NIFTY REALTY	1131.30	1130.15	0.10%
BSE CG	73584.88	74066.20	-0.65%
BSE CD	67509.38	68115.77	-0.89%
BSE Oil & GAS	31096.31	30980.18	0.37%
BSE POWER	8744.00	8767.98	-0.27%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38925.63	37870.26	2.79%
HANG SENG	19924.58	19129.10	4.16%
STRAITS TIMES	3582.23	3583.27	-0.03%
SHANGHAI	3000.95	2896.31	3.61%
KOSPI	2671.57	2596.32	2.90%
JAKARTA	7744.52	7740.90	0.05%
TAIWAN	22858.81	22761.60	0.43%
KLSE COMPOSITE	1671.32	1673.38	-0.12%
ALL ORDINARIES	8462.80	8372.80	1.07%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	126554.83	109967.00
NSE F&O	43351807.35	57048066.18

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	629.96
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Infosys** announced that it has collaborated with Swedish electric performance car brand Polestar to create a base for the latter's development of in-car infotainment, software and electrical engineering and cloud-powered digital services.
- **Tata Motors'** Jaguar Land Rover intends to invest EUR 500 Million (\$669 million) retooling one of its factories in England, which is set to begin producing electric SUVs.
- **Tata Electronics**, a wholly owned subsidiary of Tata Sons said it has completed the Definitive Agreement with Powerchip Semiconductor Manufacturing Corporation (PSMC) of Taiwan.
- **NBCC (India)** has secured an order of Rs 75 crore as Project Management Consultant (PMC) for construction & development of various infrastructure works at Indian Institute of Information Technology (IIIT), Nagpur to be undertaken under EPC mode.
- Mukta Arts signed a six-year deal with **Zee Entertainment** for the satellite and media rights of 37 films.
- **Power Mech Projects** has received an order worth Rs 226.66 crore related to Comprehensive Operations and Maintenance (O&M) partner for Gujarat Mineral Development Corporation's 250 (2X125) MW Akrimota Thermal Power Station (ATPS), Gujarat.
- **Prestige Estates** has announced the launch of its luxury residential project Prestige Pine Forest, which is located at Whitefield, Bangalore.
- **Central Depository Services (India) Limited** announced the introduction of a uniform tariff of Rs 3.50 per debit transaction, effective from October 1, 2024.
- The government said 2.40 million tonnes (MT) of coking coal have been booked of the 3.36 MT offered by **Coal India** arm Bharat Coking Coal Ltd (BCCL) under auction mode for the steel sector for long-term linkages.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
MARUTI	13383.80	12785.30	4.68%
GRASIM	2745.85	2662.00	3.15%
TATAMOTORS	993.15	963.60	3.07%
SHRIRAMFIN	3628.45	3524.05	2.96%
M&M	3181.10	3091.05	2.91%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
CIPLA	1621.80	1643.20	-1.30%
ONGC	295.20	298.70	-1.17%
LT	3762.15	3793.85	-0.84%
HEROMOTOCO	6051.45	6088.30	-0.61%
NTPC	434.60	436.10	-0.34%

(Source: [Moneycontrol](#))

- **KPI Green Energy** said that it has received a letter of award (LoA) for the development of a 66.20 MW hybrid power project under the captive power producer (CPP) segment of the company.

- OTT aggregator **Tata Play Binge** announced that it is expanding its global footprint by providing Platform as a service (PaaS) to Philippines' Cignal TV's OTT aggregation platform, Cignal Super. This follows the recent collaboration with Akash TV in Bangladesh.
- Zetwerk Manufacturing announced that it has secured a 1,515 MWp (megawatt peak) order from **NTPC** for the production and supply of ALMM-compliant solar PV modules. This will include needed spares for Gujarat's 1,200-MW Khavda solar plant.
- **Emami** said that its wholly owned subsidiary, Emami International FZE and Emami International Personal Care has incorporated Emami Neo-Herbals International in Bangladesh.
- **Cipla** said that its wholly owned subsidiary in UK, Cipla (EU) has entered into definitive agreement with Jiangsu Xidi Pharmaceuticals to acquire 6.9124% stake in Cipla (Jiangsu) Pharmaceuticals.
- **Oil and Natural Gas Corporation** said that its board has approved an investment of Rs 10,501 crore in equity shares of ONGC Petro additions (OPaL), in one or more tranches.

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

Global News

- China is considering injecting up to CNY 1 trillion into its largest state-owned banks to boost their capacity to support the weak economy.
- U.S. building permits rose by 4.6% to a seasonally adjusted annual rate of 1.470 million in August 2024, revised down from a preliminary estimate of 1.475 million.
- U.S. new home sales plunged by 4.7% to an annual rate of 716,000 in August after soaring by 10.3% to a revised rate of 751,000 in July.
- Eurozone bank lending to households moved up 0.6% in August from a year ago, following a 0.5% rise in July. Likewise, adjusted loans to businesses climbed at a faster pace of 0.8% after July's 0.6% increase. The annual annual growth in M3, the broad monetary aggregates, improved to 2.9% in August from 2.3% a month ago.

- GfK Consumer Climate Indicator rose to -21.2 heading into October 2024 from a marginally revised -21.9 in the previous period.

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

Economic News

- Crude Oil traded at US\$ 67.91/bbl (IST 17:00).
- INR weakened to Rs. 83.72 from Rs. 83.65 against each US\$ resulting in daily change of 0.09%.
- Coal imports during April-July saw a marginal increase of 0.9%, reaching 90.51 million tonnes compared to 89.68 million tonnes in the previous year. Non-coking coal imports increased by 2% in the period, while coking coal imports declined by 2.6%.
- India's foodgrain production hit a record 332.22 million tonnes in the 2023-24 crop year, driven by bumper wheat and rice output. Wheat production reached 113.29 million tonnes, while rice production touched 137.82 million tonnes.

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

Forthcoming Events

Board Meetings as on 27/09/2024

Asian Hotels (West) Limited	Financial Results
Jamna Auto Industries Limited	Financial Results
Kross Limited	Financial Results
Supreme Infrastructure India Limited	Fund Raising
Zee Media Corporation Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 27/09/2024

Sanghvi Movers Limited	Face Value Split (Sub-Division) - From Rs 2/- Per Share To Re 1/- Per Share
------------------------	---

(Source: NSE)

DISCLAIMER

This document has been prepared by Shriram Insight Share Brokers Ltd. and is meant for sole use by the recipient and not for circulation. This document is not to be reported or copied or made available to others. The information contained herein is from sources believed reliable. It should not be considered as an offer to sell or a solicitation to buy any security or as an official confirmation of any transaction. We do not represent that it is accurate or complete and it should not be relied upon as such. This document is prepared for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The investments discussed or recommended in this report may not be suitable for all investors. Shriram Insight Share Brokers Ltd. Stock Recommendation Service is a general recommendation service and is not to be construed as an individual investor-specific Portfolio Management and Advisory Service.

The user assumes the entire risk of any use made of this information. Each recipient of this document should arrive at an independent evaluation of an investment in the securities of companies referred to in this document and should consult their own advisors to determine the merits and risks of such an investment.

Shriram Insight Share Brokers Ltd. shall not be responsible for any loss or liability incurred to the user as a consequence of his or any other person on his behalf taking any investment decisions based on the information, recommendations, research reports, analysis, quotes, etc. provided on the web site.

Shriram Insight Share Brokers Ltd shall not be liable for errors, omissions or typographical errors, disruption delay, interruption, failure, deletion or defect of/in the Service provided by it.

All Users of the Service in countries other than India understand that by using the Service, they may be violating the local laws in such countries. If the User chooses to access the Service from outside India, he shall be responsible for compliance with foreign and local laws.

EQUITIES | DERIVATIVES | COMMODITIES | DP SERVICES | MUTUAL FUNDS | RESEARCH

SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Saltlake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : research@shriraminsight.com | www.shriraminsight.com |