Morning Wealth

BP WEALTH

Monday, 06th October, 2025

Nifty Futures	Level 1	Level 2	Level 3
Resistance	25,000	25,120	25,260
Support	24,700	24,580	24,420

Indices (NSE)	Close	Pts. Chg	% Chg
Nifty 50	24,894.3	58.0	0.2
Nifty Future (Oct)	25,007.1	39.9	0.2
Nifty Future (Nov)	25,142.0	48.4	0.2
Nifty Bank	55,589.3	241.3	0.4
Nifty 100	25,569.3	66.4	0.3
Nifty 500	23,027.7	99.4	0.4
NIFTY MIDCAP 100	57,503.4	473.7	0.8

Indices (BSE)	Close	Pts. Chg	% Chg
SENSEX	81,207.2	223.9	0.3
BSE 100	26,098.4	74.4	0.3
BSE 200	11,310.0	40.0	0.4
BSE All Cap	10,576.6	51.0	0.5
BSE Midcap	45,678.1	352.8	0.8
BSE SmallCap	53,375.0	576.8	1.1

Sectoral Indices	Close	Pts. Chg	% Chg
Bankex	62,741.1	339.5	0.5
Capital Goods	69,458.2	699.7	1.0
Realty	6,809.1	-6.2	-0.1
Power	6,808.6	44.3	0.7
Oil & Gas	27,093.8	147.8	0.6
Metal	34,048.6	619.7	1.9
CD	58,648.7	666.9	1.2
Auto	59,711.5	16.7	0.0
TECK	16,641.5	75.3	0.5
IT	33,548.4	87.3	0.3
FMCG	20,299.4	49.5	0.2
Healthcare	43,523.8	-40.6	-0.1
India VIX	10.1	-0.2	0.0

Exchange	Advance	Decline	Unchange
BSE	2,636	1,568	153
NSE	2,051	996	75

Volume	Current Rs (in cr)	% Chg
NSE Cash	1,12,827.7	13.1
BSE Cash	7,767.9	-8.6
NSE F&O	-	-

Net Inflows/Outflows (Rs in cr)	Buy	Sell	Net
FII	16,898.8	18,482.2	-1,583.4
DII	14,005.4	13,515.6	489.8

Intraday Nifty Outlook

The benchmark index continues to trade in a broad consolidation range, showing indecisiveness near its key short-term average. The immediate and crucial hurdle for the bulls is the supply zone of 25,000-25,100. As long as the index trades below this level, the sentiment remains sideways to slightly negative, with a possibility of retesting the strong support base at 24,650-24,700. A decisive breakout above 25,100 is essential to trigger fresh upward momentum. Options data suggests significant call writing at the 25,000 and 25,100 strikes, reinforcing this resistance, while the 24,700 put strike holds substantial interest, acting as a floor for now.

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Corporate News

Vedanta plans to invest Rs 13,226 crores to ramp up aluminium capacity

Anil Agarwal-led Vedanta Ltd plans to pump in Rs 13,226 crore to ramp up its aluminium capacity to 3.1 million tonnes per annum (MTPA) by FY28, sources said. The current capacity of the company is 2.4 MTPA. Vedanta Ltd is anchoring aluminium at the centre of its growth strategy, with an expansion plan that will take capacity to 3.1 million tonnes per annum (MTPA) by FY28, sources said. The company is planning to invest Rs 13,226 crore over the next few years for this expansion, they said. Aluminium, the world's second-most consumed metal after steel, is becoming increasingly critical to electric mobility, renewable energy, urban infrastructure, and aerospace. Vedanta, the country's leading aluminium producer with over 50 per cent share in domestic market, is also set to ensure aluminium remains the single biggest contributor to its target of 8-10 billion dollar EBITDA at group level by FY28, as per its recent exchange filing. Vedanta's aluminium capacity will expand to 2.75 MTPA by FY26, and further to 3.1 MTPA by FY28, sources said.

Source: Daily Excelsior

Infosys Collaborates with Telenor Shared Services to Modernize its HR Operations with a new Oracle Fusion Cloud Human Capital Management (HCM) Solution

Infosys announced its collaboration with Telenor Shared Services (TSS), a global business services organization that provides systems, services, and support to Telenor Group. Infosys will help TSS standardize HR processes, enhance employee productivity and experience through implementation of Oracle Cloud Human Capital Management (HCM). This collaboration highlights Infosys' deep expertise in Oracle Cloud HCM implementations and its commitment to delivering digital transformation solutions that improve HR performance and operational efficiency for the telecom industry. Through this collaboration, Infosys will help TSS streamline HR operations and unify its Human Capital Management, Financial Management, Supply Chain Management, and Projects Portfolio Management on a single platform. The resulting end-to-end digital integration will improve data quality and enable better decision-making through dashboards and advanced analytics, reshaping how TSS engages with its partners, suppliers, and employees.

Source: Infosys Press Release

Bansal Wire Industries reports fire incident at Dadri plant

Bansal Wire Industries reports fire incident at Dadri plant Bansal Wire Industries has reported a fire incident at its Dadri plant in Gautam Buddha Nagar, Uttar Pradesh. The fire broke out on October 2, 2025, at approximately 8:15 PM IST in the C Shed of the facility. The company received the communication about the incident at 8:27 AM IST. Fortunately, the fire was already under control by the time it was reported, and no injuries or casualties have been reported. While operations at the C Shed are temporarily disrupted, the A and B Sheds of the plant continue to function smoothly without any issues. The cause of the fire is currently under investigation, and the company is actively assessing the extent of damage.

Source: Business Upturn

Nifty Top 5 Gainers	Close	Pts. Chg	% Chg
TATASTEEL	173.2	5.7	3.4
POWERGRID	289.7	9.1	3.2
HEROMOTOCO	5,550.5	118.0	2.2
HINDALCO	780.4	14.4	1.9
AXISBANK	1,181.0	21.5	1.9

Nifty Top 5 Losers	Close	Pts. Chg	% Chg
COALINDIA	383.4	-5.1	-1.3
EICHERMOT	6,941.0	-80.5	-1.2
TECHM	1,400.6	-15.4	-1.1
MARUTI	15,806.0	-159.0	-1.0
SBILIFE	1,785.1	-16.0	-0.9

Int. Indices	Close	Pts. Chg	% Chg
S&P 500	6,715.8	0.4	0.0
Dow Jones	46,758.3	238.6	0.5
Nasdaq	22,780.5	-63.5	-0.3
FTSE 100	9,491.3	63.5	0.7
DAX	24,378.8	-43.8	-0.2
CAC 40	8,081.5	24.9	0.3
Nikkei 225	47,828.5	2,059.0	4.3
Hang Seng	26,958.5	-182.4	-0.7

ADR	Close	Pts. Chg	% Chg
HDFC Bank ADR	34.3	0.2	0.5
ICICI Bank ADR	30.8	0.1	0.4
Infosys ADR	16.2	0.1	0.5
Wipro ADR	2.6	0.0	0.0

Currencies	Close	Pts. Chg	% Chg
Dollar Index*	98.0	0.1	0.1
USD/INR	88.7	0.1	0.1
EURO/INR	104.2	-0.2	-0.2
USD/YEN*	149.9	2.3	1.5

Commodities	Close	Pts. Chg	% Chg
Gold (spot) Rs	1,18,110.0	522.0	0.4%
Silver (spot) Rs	1,45,574.0	854.0	0.6%
Crude (Brent) $*	65.5	1.0	1.5%
Crude Oil (WTI) $*	61.8	0.9	1.5%

*rates as at 8.30 am

Economy

Broader Labour Survey on cards to capture more data on skilling

The ministry of skills development and entrepreneurship will soon write to the ministry of statistics and programme implementation to expand the scope of the Periodic Labour Force Survey (PLFS) as it seeks more comprehensive data on skilling to address the issue of demand-supply mismatch and bring in required policy interventions. Some of the additions to the PLFS that could be proposed include capturing quality aspects of vocational and technical education along with computing the unemployment rate among youths equipped with vocational and technical training. MSDE wants these modifications to be introduced from next fiscal year as it gears up to prepare a skilled pool of workers to cater to industry demand under the upcoming National Policy for Skill Development and Entrepreneurship 2025.

Source: Economic Times

International News

Hong Kong PMI Slows To 50.4 - S&P Global

The private sector in Hong Kong continued to expand in September, albeit at a slower pace, the latest survey from S&P Global revealed on Monday with a PMI score of 50.4. That's down from 50.7 in August, although it remains above the boom-or-bust line of 50 that separates expansion from contraction. Business activity across the private sector increased for the second successive month during September, with the rate of growth edging up to the highest since November 2024. The service sector led the expansion, as activity levels fell across the three other monitored sectors. New orders meanwhile decreased at a fractional pace, with the rate of contraction unchanged from that seen in August. Survey respondents often mentioned improved domestic orders across online platforms. That said, firms noted that US tariffs continued to weigh on demand from Mainland China and globally. In fact, the latest reduction in new export orders was the most marked since March 2022.

Source: RTT News

Major Bulk Deal (NSE)

Scrip Name	Qty	Type	Client Name	Trade Price
NO MAJOR BULK DEALS				

Major Bulk Deal (BSE)

Scrip Name	Qty	Type	Client Name	Trade Price
NO MAJOR BULK DEALS				

EVENTS CALENDAR

Monday	Tuesday	Wednesday	Thursday	Friday
06–Oct-2025 Results– Economic — Global– GBP GDP (QOQ) (Q2), US Chicago PMI (Sep)	07–Oct-2025 Results– Economic — Interest rate decision Global– EUR CPI (YOY) (Sep), US S&P Global manufacturing PMI (Sep), US ISM manufacturing PMI (Sep)	08–Oct-2025 Results– Economic— Global– EUR Unemployment rate (Aug)	09–Oct-2025 Results– Economic — Global– US Average hourly earnings (MOM) (Sep), US unemployment rate (Sep), US S&P Global services PMI (Sep), ISM non-manufacturing PMI (Sep)	10–Oct-2025 Results– Economic — Global– CNY Manufacturing PMI (Sep)
13–Oct-2025 Results– Economic — CPI (YoY) (Sep) Global–	14–Oct-2025 Results– Economic — WPI Inflation (YoY) (Sep) Global– China CPI (YoY) (Sep)	15–Oct-2025 Results– Economic— Global– US Core CPI (MoM) (Sep)	16–Oct-2025 Results– Economic — Global– US Retail Sales (MoM) (Sep), PPI (MoM) (Sep)	17–Oct-2025 Results– Economic — Global–
20–Oct-2025 Results– Economic — Global– US Leading Index (MOM) (Sep)	21–Oct-2025 Results– Economic — Global– JPY Trade Balance (Sep), JPY Exports (YOY) (Sep)	22–Oct-2025 Results– Economic— Global– GBP CPI (YOY) (Sep)	23–Oct-2025 Results– Economic — Global– US Existing Home Sales (Sep), JPY National Core CPI (YOY) (Sep)	24–Oct-2025 Results– Economic — Global–

(Source: Investing.com and BSE)

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Disclaimer Appendix

Analyst (s) holding in the Stock : Nil

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