Morning Wealth

BP WEALTH

Tuesday, 07th October, 2025

Nifty Futures	Level 1	Level 2	Level 3
Resistance	25,120	25,250	25,400
Support	25,000	24,850	24,700

Indices (NSE)	Close	Pts. Chg	% Chg
Nifty 50	25,077.7	183.4	0.7
Nifty Future (Oct)	25,181.0	174.5	0.7
Nifty Future (Nov)	25,302.3	164.9	0.7
Nifty Bank	56,104.9	515.6	0.9
Nifty 100	25,741.0	171.7	0.7
Nifty 500	23,169.7	142.0	0.6
NIFTY MIDCAP 100	58,015.1	511.8	0.9

Indices (BSE)	Close	Pts. Chg	% Chg
SENSEX	81,790.1	583.0	0.7
BSE 100	26,281.9	183.4	0.7
BSE 200	11,384.3	74.3	0.7
BSE All Cap	10,631.1	54.5	0.5
BSE Midcap	45,988.2	310.1	0.7
BSE SmallCap	53,270.6	-104.4	-0.2

Sectoral Indices	Close	Pts. Chg	% Chg
Bankex	63,431.7	690.6	1.1
Capital Goods	69,564.1	105.9	0.2
Realty	6,852.9	43.9	0.6
Power	6,798.9	-9.6	-0.1
Oil & Gas	27,360.4	266.6	1.0
Metal	33,735.7	-313.0	-0.9
CD	58,638.0	-10.7	0.0
Auto	59,899.9	188.4	0.3
TECK	16,908.1	266.6	1.6
IT	34,207.4	659.0	2.0
FMCG	20,261.0	-38.4	-0.2
Healthcare	43,982.5	458.7	1.1
India VIX	10.2	0.1	0.0

Exchange	Advance	Decline	Unchange
BSE	1,780	2,506	180
NSE	1,340	1,729	83

Volume	Current Rs (in cr)	% Chg
NSE Cash	96,871.8	-14.1
BSE Cash	7,189.6	-7.4
NSE F&O	-	-

Net Inflows/Outflows (Rs in cr)	Buy	Sell	Net
FII	10,950.2	11,264.0	-313.8
DII	16,124.5	11,088.1	5,036.4

Intraday Nifty Outlook

The benchmark index experienced a significant breakout today, decisively crossing and closing above its crucial resistance zone of 25,050. This move, backed by healthy volumes, signals a potential end to the recent consolidation and a resumption of the uptrend. The previous resistance zone around 25,000 will now act as a strong support base for any potential dips. With momentum turning positive, the next upside target to watch for is 25,250, followed by 25,400. The options data now likely shows a shift in range, with put writers expected to build aggressive positions at the 25,000 strike..

Corporate News

LTIMindtree wins its largest-ever deal; sources peg size at $580 million

Indian IT services company LTIMindtree announced on Monday that it had won its largest-ever deal, with two sources aware of the matter pegging the size at $580 million. The sixth largest software services exporter in India said the deal was with a leading global media and entertainment company, but did not disclose the name of the client. The company did not immediately respond to a request for comment on the size of the deal or the name of the client. The deal comes at a time when India's $283-billion IT sector is facing macroeconomic uncertainties, tariff-related risks and changes in U.S. immigration policy. India's IT companies will report their numbers for the September quarter starting Thursday, and analysts expect muted results.

Source: Business Standard

Brigade Enterprises signs JDA for premium Chennai residential project with ₹1,000 cr GDV

Real estate major Brigade Enterprises Ltd has entered into a joint development agreement (JDA) for a 6.6-acre land parcel in West Chennai, marking another strategic expansion in one of its key markets. The premium residential project carries an estimated gross development value (GDV) of ₹1,000 crore and is positioned along a major arterial corridor offering connectivity to Chennai's industrial and business districts. The upcoming development will feature modern apartments, lifestyle amenities and ESG-aligned infrastructure, and is expected to launch in 2026, subject to regulatory approvals. The project, Brigade said, is designed to meet the evolving aspirations of Chennai's urban homebuyers and investors seeking quality housing in well-connected locations. Commenting on the development, Managing Director Pavitra Shankar said the venture aligns with Brigade's strategy of deepening its footprint in Chennai. She noted that the city's property market remains on a "strong growth trajectory" backed by infrastructure improvements and robust end-user demand.

Source: CNBC TV18

Zydus Lifesciences receives USFDA approval for Deflazacort oral suspension

Zydus Lifesciences Limited on Monday said it received final approval from the health regulator of the United States for Deflazacort oral suspension used for treating a severe form of muscular dystrophy. The approval given by United States Food and Drug Administration (USFDA) is for Deflazacort oral suspension of 22.75mg/ml, the company stated in a regulatory filing with the stock exchanges. Deflazacort oral suspension is indicated for treating Duchenne Muscular Dystrophy (DMD) in patients five years of age and older, the company added. Deflazacort belongs to a group of medications called steroids. It works by decreasing inflammation and slowing down an overactive immune system. Deflazacort oral suspension will be produced at Doppel, Italy, the company stated. The group now has 424 approvals and has so far filed 487 ANDAs -- as on September 30 -- since the commencement of the filing process in FY 2003-04.

Source: BusinessLine

Morning Wealth

Nifty Top 5 Gainers	Close	Pts. Chg	% Chg
SHRIRAMFIN	671.5	25.7	4.0
TCS	2,988.4	86.5	3.0
APOLLOHOSP	7,662.0	212.5	2.9
TECHM	1,439.3	38.7	2.8
AXISBANK	1,212.8	31.8	2.7

Nifty Top 5 Losers	Close	Pts. Chg	% Chg
TATASTEEL	170.1	-3.2	-1.8
ADANIPORTS	1,400.5	-18.6	-1.3
INDUSINDBK	739.3	-8.1	-1.1
POWERGRID	286.9	-2.8	-1.0
EICHERMOT	6,880.0	-61.0	-0.9

Int. Indices	Close	Pts. Chg	% Chg
S&P 500	6,740.3	24.5	0.4
Dow Jones	46,695.0	-63.3	-0.1
Nasdaq	22,941.7	161.2	0.7
FTSE 100	9,479.1	-12.1	-0.1
DAX	24,378.3	-0.5	0.0
CAC 40	7,971.8	-109.8	-1.4
Nikkei 225	48,371.5	426.7	0.9
Hang Seng	26,957.8	-183.2	-0.7

ADR	Close	Pts. Chg	% Chg
HDFC Bank ADR	34.8	0.6	1.7
ICICI Bank ADR	30.7	0.0	-0.1
Infosys ADR	16.7	0.5	2.8
Wipro ADR	2.7	0.0	1.5

Currencies	Close	Pts. Chg	% Chg
Dollar Index*	98.2	0.2	0.2
USD/INR	88.7	0.0	0.0
EURO/INR	103.8	-0.3	-0.3
USD/YEN*	150.5	0.6	0.4

Commodities	Close	Pts. Chg	% Chg
Gold (spot) Rs	1,20,325.0	2,212.0	1.9%
Silver (spot) Rs	1,47,600.0	1,856.0	1.3%
Crude (Brent) $*	65.7	0.2	0.4%
Crude Oil (WTI) $*	61.9	0.2	0.4%

*rates as at 8.30 am

Economy

India-Qatar bilateral trade can be doubled by 2030: Piyush Goyal

The Union Minister of Commerce and Industry, Piyush Goyal, is on an official visit to Doha, Qatar to co-chair the meeting of the India-Qatar Joint Commission on Economic and Commercial Cooperation along with H.E. Sheikh Faisal bin Thbin Faisal Al Thani, Minister of Commerce and Industry of the State of Qatar. The first day of his visit began with a floral tribute to the statue of Mahatma Gandhi at the Embassy of India in Doha, followed by the planting of a sapling under the "Ek Ped Maa Ke Naam" initiative, symbolising India's commitment to sustainability and environmental stewardship, as per the release. According to the release, the bilateral meeting of Commerce and Industry ministers of both sides was also held, where both Ministers reviewed the overall trade and economic relationship, addressed existing trade barriers, and explored new areas for cooperation in sectors such as finance, agriculture, healthcare, etc. The two Ministers then jointly addressed the India-Qatar Joint Business Council (JBC) meeting, attended by senior representatives from FICCI, CII, ASSOCHAM, and the Qatar Chamber, as well as members of the business community from both countries. The Commerce and Industry Minister of India highlighted that, despite global economic headwinds and supply chain disruptions, India continues to demonstrate strong macroeconomic stability, creating a thriving start-up ecosystem. This, in turn, creates a highly enabling environment for global businesses. The Minister urged Indian and Qatari businesses to explore greater opportunities. Union Minister of Commerce and Industry co-chaired the Qatar-India Joint Commission on Economic and Commercial Cooperation with H.E. Sheikh Faisal bin Thani bin Faisal Al Thani, Minister of Commerce and Industry of Qatar.

Source: Economic Times

International News

Japan Household Spending Climbs 0.6% On Month In August

The average of household spending in Japan was up a seasonally adjusted 0.6 percent a month in August, the Ministry of Internal Affairs and Communications said on Tuesday - coming in at 313,977 yen. That beat expectations for an increase of 0.1 percent following the 1.7 percent jump in July. On a yearly basis, household spending climbed 2.3 percent - again topping forecasts for a gain of 1.4 percent - which would have been unchanged from the previous month. The average of monthly income per household stood at 608,578 yen, up 2.8 percent from the previous year.

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 — 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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