Morning Wealth

BP WEALTH

Wednesday, 08th October, 2025

Nifty Futures	Level 1	Level 2	Level 3
Resistance	25,250	25,400	25,540
Support	25,000	24,850	24,700

Indices (NSE)	Close	Pts. Chg	% Chg
Nifty 50	25,108.3	30.7	0.1
Nifty Future (Oct)	25,229.0	43.6	0.2
Nifty Future (Nov)	25,361.0	46.8	0.2
Nifty Bank	56,239.4	134.5	0.2
Nifty 100	25,772.3	31.3	0.1
Nifty 500	23,209.5	39.9	0.2
NIFTY MIDCAP 100	58,289.4	274.3	0.5

Indices (BSE)	Close	Pts. Chg	% Chg
SENSEX	81,926.8	136.6	0.2
BSE 100	26,324.9	43.0	0.2
BSE 200	11,404.1	19.8	0.2
BSE All Cap	10,645.7	14.6	0.1
BSE Midcap	46,196.2	208.0	0.5
BSE SmallCap	53,190.3	-80.3	-0.2

Sectoral Indices	Close	Pts. Chg	% Chg
Bankex	63,331.5	-100.2	-0.2
Capital Goods	69,521.5	-42.6	-0.1
Realty	6,927.6	74.7	1.1
Power	6,807.4	8.5	0.1
Oil & Gas	27,489.2	128.8	0.5
Metal	33,637.1	-98.6	-0.3
CD	58,803.4	165.4	0.3
Auto	60,050.3	150.4	0.3
TECK	16,947.7	39.6	0.2
IT	34,120.6	-86.8	-0.3
FMCG	20,161.0	-99.9	-0.5
Healthcare	44,058.0	75.5	0.2
India VIX	10.1	-0.1	0.0

Exchange	Advance	Decline	Unchange
BSE	1,761	2,420	160
NSE	1,324	1,705	87

Volume	Current Rs (in cr)	% Chg
NSE Cash	98,573.0	1.8
BSE Cash	8,114.8	12.9
NSE F&O	-	-

Net Inflows/Outflows (Rs in cr)	Buy	Sell	Net
FII	11,543.0	10,102.3	1,440.7
DII	15,953.1	15,500.5	452.6

Intraday Nifty Outlook

After a strong breakout, the benchmark index took a pause yesterday, trading within a narrow range and closing with a marginal gain. This price action can be seen as a healthy consolidation, where the market is absorbing yesterday's gains. The critical support level to watch remains the previous resistance zone of 25,000-25,100. As long as the index sustains above this zone, the short-term outlook remains bullish, and the index may be gathering strength for its next move towards the all-time high. The options data suggests that the 25,000 strike is solidifying as a strong support base, with significant put open interest.

Corporate News

CCI clears Lloyds Metals' proposal to acquire 49.9% stake in Thriveni Pellets

Fair trade regulator CCI on Tuesday cleared Lloyds Metals and Energy's proposal to acquire a 49.99% equity stake in Thriveni Pellets Pvt Ltd. "The proposed combination involves the acquisition of 49.99% of the equity share capital of TPPL (Thriveni Pellets Pvt Ltd) by LMEL (Lloyds Metals and Energy Ltd)," the regulator said in a release. LMEL is engaged in the business of iron ore mining, direct reduced iron production, generation of captive power, and pellet trading. It supplies iron ore fines and pellets mined/produced around the world. "Commission approves the acquisition of 49.99% equity stake of Thriveni Pellets Pvt Ltd (TPPL/Target) by Lloyds Metals and Energy Ltd," the Competition Commission of India (CCI) said. TPPL is engaged in the sale of iron ore pellets in India. TPPL's wholly-owned subsidiary, Brahmani River Pellets Ltd, is engaged in the production and sale of iron ore pellets in India.

Source: CNBC TV18

Saatvik Green Energy bags ₹488 crore solar module orders

Renewable energy firm Saatvik Green Energy Ltd on Tuesday announced that it has received and accepted orders worth ₹488 crore from leading Independent Power Producers (IPPs) and EPC companies for the supply of solar PV modules, to be executed during FY26. Its material subsidiary, Saatvik Solar Industries Pvt Ltd, has also secured orders worth ₹219.62 crore from three renowned IPPs and EPC partners under the same timeline, further strengthening the group's overall order pipeline in the clean energy space.

Source: CNBC TV18

CONCOR signed agreement with India's largest cement manufacturer, UltraTech Cement

Container Corporation of India Ltd. (CONCOR), a Navratna PSU under the Ministry of Railways, has entered into a strategic agreement with M/s UltraTech Cement Ltd., India's largest cement manufacturer, to transport bulk cement using specialized tank containers. This collaboration is a major step forward in promoting rail-based cargo movement and supporting India's vision of sustainable logistics. Under this collaboration, CONCOR will provide dedicated rakes for the transportation of bulk cement across identified rail corridors. This initiative marks a significant milestone in redefining bulk cement logistics in India. This first-of-its-kind large-scale initiative in the country is designed to promote a modal shift from road to rail, offering a more sustainable, efficient, and reliable alternative for cement transportation. By leveraging Indian Railways' extensive network and CONCOR's proven capabilities in logistics and multimodal transportation, this partnership is expected to streamline cement supply chains, reduce road congestion, lower transportation costs, and significantly cut down carbon emissions.

Source: PSU Connect

Nifty Top 5 Gainers	Close	Pts. Chg	% Chg
BHARTIARTL	1,929.0	25.9	1.4
INDUSINDBK	749.0	9.7	1.3
BAJAJ-AUTO	8,904.0	112.0	1.3
JIOFIN	309.9	3.6	1.2
EICHERMOT	6,957.0	77.0	1.1
Nifty Top 5 Losers	**Close**	**Pts. Chg**	**% Chg**
AXISBANK	1,186.8	-26.0	-2.1
TATAMOTORS	698.1	-14.6	-2.1
TATACONSUM	1,120.0	-22.1	-1.9
TRENT	4,686.0	-91.3	-1.9
ADANIENT	2,542.2	-31.3	-1.2

Int. Indices	Close	Pts. Chg	% Chg
S&P 500	6,714.6	-25.7	-0.4
Dow Jones	46,603.0	-92.0	-0.2
Nasdaq	22,788.4	-153.3	-0.7
FTSE 100	9,483.6	4.4	0.0
DAX	24,385.8	7.5	0.0
CAC 40	7,974.9	3.1	0.0
Nikkei 225	47,969.0	18.1	0.0
Hang Seng	26,686.0	-271.8	-1.0

ADR	Close	Pts. Chg	% Chg
HDFC Bank ADR	34.9	0.1	0.2
ICICI Bank ADR	31.0	0.3	0.9
Infosys ADR	16.4	-0.3	-1.8
Wipro ADR	2.6	0.0	-1.1

Currencies	Close	Pts. Chg	% Chg
Dollar Index*	98.9	0.7	0.7
USD/INR	88.7	0.0	0.0
EURO/INR	103.8	0.0	0.0
USD/YEN*	152.5	2.0	1.3

Commodities	Close	Pts. Chg	% Chg
Gold (spot) Rs	1,21,055.0	806.0	0.7%
Silver (spot) Rs	1,45,410.0	-2,109.0	-1.4%
Crude (Brent) $*	66.0	0.5	0.4%
Crude Oil (WTI) $*	62.3	0.5	0.4%

*rates as at 8.30 am

Economy

Indian exporter secures interim Bangladesh government's first 50,000 ton rice import tender

A Raipur-based firm has secured the first international rice import tender of 50,000 tonnes floated directly by the interim Bangladesh government. Bagadiya Brothers Pvt Ltd of Chhattisgarh bagged the order, a senior official of the company said. The tender opening sheet (TOS) accessed by PTI showed that bidders from India, Singapore, UAE and Indonesia took part in the process, and Bagadiya Brothers Pvt Ltd secured the order at USD 359.77 per tonne. "We have secured the order. We have to supply the consignment within 40 days," said SP Jaiswal, AGM of Bagadiya Brothers Pvt Ltd. The interim Bangladesh government's first international tender bids were opened for 50,000 tonnes of rice import on Monday, said Rahul Khaitan, director of Jai Baba Bakreswar Rice Mill, a West Bengal-based firm which unsuccessfully took part in the tender process. "Bangladesh's direct rice procurement target is 4 lakh tonnes, and more tenders are likely to follow soon. West Bengal's rice mills and exporters are expected to benefit from these upcoming orders," he added. Out of the total 9 lakh tonnes announced in July by the neighbouring country, 5 lakh tonnes were allocated to private importers, and such private exports have already begun. "As per estimates, around 1.5 lakh tonnes of private exports have been completed so far, and West Bengal's exporters have secured a significant share of these orders," Khaitan said.

Source: Economic Times

International News

German Factory Orders Fall Unexpectedly

Germany's factory orders declined unexpectedly in August, data released by Destatis showed on Tuesday. Factory orders decreased 0.8 percent on a monthly basis, following a 2.7 percent decrease in July. This was in contrast to the anticipated increase of 1.2 percent. Excluding large orders, new orders were 3.3 percent lower than in the previous month. New orders for capital goods decreased 1.5 percent, while demand for consumer goods fell markedly by 10.3 percent. On the other hand, orders for intermediate goods rose 3.0 percent. Foreign orders decreased 4.1 percent in August. Orders from within the Eurozone fell 2.9 percent and that from outside the Eurozone slid 5.0 percent. In contrast, domestic orders grew 4.7 percent. On an annual basis, factory orders logged an increase of 1.5 percent after a decrease of 3.3 percent in July.

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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