

Nifty Futures	Level 1	Level 2	Level 3
Resistance	25,120	25,260	25,400
Support	25,000	24,850	24,700

Indices (NSE)	Close	Pts. Chg	% Chg
Nifty 50	25,046.2	-62.2	-0.2
Nifty Future (Oct)	25,112.5	-112.8	-0.5
Nifty Future (Nov)	25,252.0	-103.6	-0.4
Nifty Bank	56,018.3	-221.1	-0.4
Nifty 100	25,685.9	-86.4	-0.3
Nifty 500	23,109.4	-100.2	-0.4
NIFTY MIDCAP 100	57,866.8	-422.7	-0.7

Indices (BSE)	Close	Pts. Chg	% Chg
SENSEX	81,773.7	-153.1	-0.2
BSE 100	26,232.4	-92.5	-0.4
BSE 200	11,355.1	-49.0	-0.4
BSE All Cap	10,599.2	-46.5	-0.4
BSE Midcap	45,852.2	-344.1	-0.7
BSE SmallCap	52,966.6	-223.7	-0.4

Sectoral Indices	Close	Pts. Chg	% Chg
Bankex	63,051.2	-280.3	-0.4
Capital Goods	68,690.2	-831.3	-1.2
Realty	6,797.5	-130.1	-1.9
Power	6,706.3	-101.1	-1.5
Oil & Gas	27,284.1	-205.0	-0.8
Metal	33,560.4	-76.7	-0.2
CD	59,021.8	218.4	0.4
Auto	59,242.4	-807.9	-1.4
TECK	17,174.1	226.5	1.3
IT	34,633.6	513.0	1.5
FMCG	20,072.5	-88.6	-0.4
Healthcare	43,882.5	-175.5	-0.4
India VIX	10.3	0.3	0.0

Exchange	Advance	Decline	Unchange
BSE	1,670	2,516	157
NSE	1,178	1,878	81

Volume	Current Rs (in cr)	% Chg
NSE Cash	89,602.6	-9.1
BSE Cash	7,644.0	-5.8
NSE F&O	-	-

Net Inflows/Outflows (Rs in cr)	Buy	Sell	Net
FII	10,287.0	10,205.7	81.3
DII	11,733.5	11,403.5	330.0

Intraday Nifty Outlook

The benchmark index witnessed a sharp reversal today in what appears to be a classic bull trap, where the recent breakout failed to sustain. The index fell back into its consolidation range and closed below the critical 25,100 level, indicating strong selling pressure near the highs. The zone of 25,100-25,200 has now been re-established as a formidable resistance. The immediate support to watch on the downside is 25,000. A break below this could signal further weakness. The options data now shows call writers have aggressively regained control of the 25,000 and 25,100 strikes, shifting the immediate bias to negative.

Corporate News

Lupin to invest \$250 million in new US pharma plant in Coral Springs, Florida

Drug maker Lupin Ltd on Wednesday (October 8) announced plans to establish a state-of-the-art pharmaceutical manufacturing facility in Coral Springs, Florida, aimed at enhancing U.S.-based production of critical respiratory medicines. The facility represents a strategic step to strengthen medicine security and support the health of Florida families and the broader U.S. population. The project involves a cumulative investment of \$250 million over five years, covering research and development, infrastructure, and capital expenditures. The new plant will have the capacity to produce more than 25 essential respiratory medicines, including lifesaving albuterol inhalers for children with asthma and service members both domestically and overseas. Christoph Funke, Chief Technical Operations Officer, Lupin, said, "The expansion of Lupin's footprint in Coral Springs is a core part of our growth strategy. This new state-of-the-art facility will build on our existing presence in Florida, which is home to Lupin's headquarters and our Advanced Inhalation Research Center." The Coral Springs facility will anchor U.S. production of critical respiratory therapies, diversify the supply chain, and ensure affordable, reliable access—from routine pediatric care to pandemic-scale demand. Lupin has acquired more than 5 acres of land to embark on this expansion of 70,000 square feet.

Source: CNBC TV18

Escorts Kubota to invest ₹2,000 crore to expand manufacturing in Haryana by 2031

Escorts Kubota Ltd said on Wednesday it plans to invest up to ₹2,000 crore by 2031 to expand its manufacturing and research facilities in Haryana, focusing on the agriculture and construction equipment sectors. The announcement was made during a meeting between Chairman and Managing Director Nikhil Nanda, Kubota Corp's Executive Vice President Shingo Hanada, and Haryana Chief Minister Nayab Singh Saini, along with other state officials, during their visit to Kubota's plant in Osaka, Japan, the company said in an exchange filing. The investment will be directed towards strengthening existing production capacity and R&D infrastructure in Haryana, the company added.

Source: CNBC TV18

Coal India Enters Into Pact With Ircn For Development Of Rail Infrastructure

Coal India Ltd. has signed a non-binding memorandum of understanding with Ircn International Ltd. to jointly develop rail Infrastructure of the company along with its subsidiaries, according to an exchange filing on Wednesday. The MoU was signed in Kolkata. "Coal India Ltd (CIL) and IRCON International Limited have executed a non-binding Memorandum of Understanding (MoU) on 08.10.2025 at Kolkata with an intent of development of Rail Infrastructure of CIL and its subsidiaries", the filing stated.

Source: NDTV Profit

Morning Wealth

Nifty Top 5 Gainers

	Close	Pts. Chg	% Chg
TITAN	3,565.6	147.4	4.3
INFY	1,495.0	36.5	2.5
TCS	3,027.2	53.5	1.8
HCLTECH	1,453.2	19.8	1.4
TECHM	1,458.2	19.3	1.3

Nifty Top 5 Losers

	Close	Pts. Chg	% Chg
TATAMOTORS	681.6	-16.5	-2.4
M&M	3,426.5	-66.3	-1.9
HEROMOTOCO	5,512.5	-102.5	-1.8
JIOFIN	304.7	-5.3	-1.7
BEL	403.7	-6.7	-1.6

Int. Indices

	Close	Pts. Chg	% Chg
S&P 500	6,753.7	39.1	0.6
Dow Jones	46,601.8	-1.2	0.0
Nasdaq	23,043.4	255.0	1.1
FTSE 100	9,548.9	65.3	0.7
DAX	24,597.1	211.4	0.9
CAC 40	8,060.1	85.3	1.1
Nikkei 225	48,364.5	629.5	1.3
Hang Seng	26,764.0	-65.5	-0.2

ADR

	Close	Pts. Chg	% Chg
HDFC Bank ADR	34.6	-0.3	-1.0
ICICI Bank ADR	30.7	-0.3	-0.9
Infosys ADR	16.7	0.4	2.1
Wipro ADR	2.7	0.0	1.1

Currencies

	Close	Pts. Chg	% Chg
Dollar Index*	98.7	-0.1	-0.2
USD/INR	88.7	0.0	0.0
EURO/INR	103.6	-0.2	-0.2
USD/YEN*	152.5	-0.1	0.0

Commodities

	Close	Pts. Chg	% Chg
Gold (spot) Rs	1,23,290.0	2,179.0	1.8%
Silver (spot) Rs	1,49,940.0	4,148.0	2.9%
Crude (Brent) \$*	65.8	-0.4	-0.8%
Crude Oil (WTI) \$*	62.1	-0.5	-0.8%

*rates as at 8.30 am

Economy

Govt to launch ₹7,350 cr plan to boost production of rare-earth magnets

The government is in final stages of launching a ₹7,350 crore scheme to spur domestic production of sintered rare earth permanent magnets (REPMs) and cut import dependence, Business Standard has learnt. This comes months after China imposed restrictions on exports of REPMs in April, squeezing supplies to India's automobile and electronics industries. The initiative — likely to be called the Scheme to Promote Sintered Rare Earth Permanent Magnet Manufacturing in India — aims to establish a fully indigenous manufacturing ecosystem with an annual production capacity of up to 6,000 tonnes. The scheme is expected to run for seven years, according to official documents. The goal is to build a homegrown value chain spanning the conversion of NdPr (neodymium-praseodymium) oxide into sintered NdFeB (neodymium-iron-boron) magnets. These are critical to sectors such as automobile, electronics, wind energy, and defence. The REPM production includes mining, beneficiation, processing, extraction, refining to rare earth oxide, conversion to metal and alloy, and finally magnet manufacturing. The proposed scheme will incentivise facilities capable of undertaking the final three stages: Converting rare earth oxide to metal, metal to alloy, and alloy to magnet. At present, India lacks the technology and infrastructure to manage these steps. Under the scheme, the government will back the creation of five integrated REPM manufacturing units, each with a capacity of up to 1,200 tonnes per annum. Applicants may bid for a minimum of 600 tonnes per annum and a maximum of 1,200 tonnes per annum, in 100 tonnes per annum increments.

Source: Economic Times

International News

U.S. Crude Oil Inventories Climb More Than Expected

A report released by the Energy Information Administration on Wednesday showed crude oil inventories in the U.S. increased by more than expected in the week ended October 3rd. The EIA said crude oil inventories grew by 3.7 million barrels last week after rising by 1.8 million barrels in the previous week. Economists had expected crude oil inventories to climb by 2.3 million barrels. At 420.3 million barrels, U.S. crude oil inventories remain about 4 percent below the five-year average for this time of year, the EIA said. Meanwhile, the report said gasoline inventories fell by 1.6 million barrels last week and are about 1 percent below the five-year average for this time of year. Distillate fuel inventories, which include heating oil and diesel, also decreased by 2.0 million barrels last week and are about 6 percent below the five-year average for this time of year, the EIA said.

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				



Morning Wealth

EVENTS CALENDAR

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

(Source: Investing.com and BSE)

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