Morning Wealth

BP WEALTH

Monday, 13th October, 2025

Nifty Futures	Level 1	Level 2	Level 3
Resistance	25,330	25,450	25,600
Support	25,240	25,110	25,000

Indices (NSE)	Close	Pts. Chg	% Chg
Nifty 50	25,285.4	103.6	0.4
Nifty Future (Oct)	25,415.0	141.2	0.6
Nifty Future (Nov)	25,520.0	132.2	0.5
Nifty Bank	56,609.8	417.7	0.7
Nifty 100	25,924.8	99.1	0.4
Nifty 500	23,337.6	95.8	0.4
NIFTY MIDCAP 100	58,697.4	267.6	0.5

Indices (BSE)	Close	Pts. Chg	% Chg
SENSEX	82,500.8	328.7	0.4
BSE 100	26,497.1	116.8	0.4
BSE 200	11,469.4	44.8	0.4
BSE All Cap	-	-	-
BSE Midcap	46,362.3	164.0	0.4
BSE SmallCap	53,378.6	314.1	0.6

Sectoral Indices	Close	Pts. Chg	% Chg
Bankex	63,872.6	612.2	1.0
Capital Goods	69,552.6	327.8	0.5
Realty	6,965.3	117.7	1.7
Power	6,796.1	47.4	0.7
Oil & Gas	27,363.0	-36.7	-0.1
Metal	33,990.6	-294.6	-0.9
CD	59,578.4	419.9	0.7
Auto	59,626.3	291.3	0.5
TECK	17,316.1	11.0	0.1
IT	34,985.3	-0.3	0.0
FMCG	20,231.3	96.4	0.5
Healthcare	44,688.2	436.2	1.0
India VIX	10.1	0.0	0.0

Exchange	Advance	Decline	Unchange
BSE	2,424	1,766	167
NSE	1,838	1,203	71

Volume	Current Rs (in cr)	% Chg
NSE Cash	94,005.0	1.7
BSE Cash	7,210.8	-11.4
NSE F&O	-	-

Net Inflows/Outflows (Rs in cr)	Buy	Sell	Net
FII	10,236.1	9,776.9	459.2
DII	12,760.1	11,052.2	1,707.8

Intraday Nifty Outlook

The benchmark index has finally broken out of its prolonged consolidation range, closing decisively above the key resistance hurdle of 25,200. This bullish move, supported by positive price action, suggests that the recent sideways trend has concluded and the uptrend is likely to resume. The zone of 25,100-25,200, which was previously acting as a ceiling, will now serve as a strong support base for any minor pullbacks. With this breakout, the index is poised to re-test its high near 25,500. Options data now indicates a significant build-up of put open interest at the 25,200 strike, reinforcing this level as the new immediate floor.

Corporate News

Mahindra Lifespaces acquires land with development potential of ₹3,500 crore in Pune

Mahindra Lifespaces Developers, in a major announcement, has said that it has acquired 13.46 acres of land in Pune. The Mahindra group's realty company acquired this land in Nande-Mahalunge, which is located about 20 kilometres from the Pune city centre. As per the company, the land is estimated to bring about a development potential of ₹3,500 crore. The company added that the land is located with 'quick access' to the IT Hub of Hinjewadi, with educational institutes such as Delhi Public School and Symbiosis center for Management near it. This comes just a day after the company, in another expansion in the redevelopment space, this time in Mumbai, said it has been selected as the preferred partner for the redevelopment of four residential societies. The project spans around 1.65 acres.

CNCB TV18

Advait Energy Transitions' arm Advait Greenergy enters ₹1,450 crore MoU with Gujarat govt

Advait Energy Transitions Ltd (formerly Advait Infratech Ltd) on Friday (October 10) said its subsidiary Advait Greenergy Private Ltd has signed a Memorandum of Understanding (MoU) with the Government of Gujarat in Mehsana, Gujarat, as part of the Investment Promotion Activity for the Vibrant Gujarat Regional Conference. As per the disclosure, the MoU aims to promote investments in Gujarat, with Advait Greenergy proposing to establish two projects aggregating to ₹1,450 crore in the state. Under the MoU, the Government of Gujarat will facilitate Advait Greenergy Private Limited in obtaining all necessary permissions, registrations, approvals, and clearances from relevant state departments, in accordance with existing policies, rules, and regulations.

Source: CNBC TV18

HCC bags ₹204 crore Hindalco contract for infra project in Odisha

Hindustan Construction Company (HCC) has secured a contract worth approximately ₹204 crore from Hindalco Industries Ltd for the fabrication, supply, and erection of pot shell and superstructure components as part of the Aditya Aluminium Smelter Expansion Project in Odisha. The project aims to increase Hindalco's aluminium smelting capacity by 200,000 tonnes per annum, and HCC's expertise in large-scale industrial fabrication will be critical in executing this complex assignment to international standards. The company has decades of experience delivering process plants, workshops, factories, and custom industrial structures, often setting up tailor-made fabrication facilities on-site to meet highly specific project requirements. This announcement comes shortly after HCC signed a strategic Memorandum of Understanding (MoU) with Konkan Railway Corporation Ltd (KRCL) on September 30, 2025, to jointly pursue and execute large-scale railway and multi-modal transport infrastructure projects in India and abroad.

Source: NDTV Profit

Nifty Top 5 Gainers	Close	Pts. Chg	% Chg
CIPLA	1,561.8	48.7	3.2
SBIN	880.7	18.6	2.2
INDUSINDBK	763.4	14.2	1.9
MARUTI	16,265.0	280.0	1.8
BAJAJ-AUTO	8,946.5	136.5	1.6
Nifty Top 5 Losers	**Close**	**Pts. Chg**	**% Chg**
TATASTEEL	173.9	-2.6	-1.5
TCS	3,028.3	-33.4	-1.1
HDFCLIFE	747.3	-7.1	-0.9
TECHM	1,457.2	-9.4	-0.6
JSWSTEEL	1,167.8	-7.4	-0.6

Int. Indices	Close	Pts. Chg	% Chg
S&P 500	6,552.5	-182.6	-2.8
Dow Jones	45,479.6	-878.8	-1.9
Nasdaq	22,204.4	-820.2	-3.7
FTSE 100	9,427.5	-81.9	-0.9
DAX	24,241.5	-369.8	-1.5
CAC 40	7,918.0	-123.4	-1.6
Nikkei 225	48,088.8	-491.6	-1.0
Hang Seng	25,667.0	-623.3	-2.4

ADR	Close	Pts. Chg	% Chg
HDFC Bank ADR	34.8	0.1	0.1
ICICI Bank ADR	31.1	0.2	0.7
Infosys ADR	16.6	-0.5	-2.9
Wipro ADR	2.7	-0.1	-2.3

Currencies	Close	Pts. Chg	% Chg
Dollar Index*	98.7	-0.7	-0.7
USD/INR	88.8	-0.1	-0.1
EURO/INR	103.1	0.4	0.4
USD/YEN*	151.9	-1.0	-0.7

Commodities	Close	Pts. Chg	% Chg
Gold (spot) Rs	1,21,492.0	999.0	0.8%
Silver (spot) Rs	1,46,698.0	374.0	0.3%
Crude (Brent) $*	65.2	0.0	0.1%
Crude Oil (WTI) $*	61.6	0.1	0.1%

*rates as at 8.30 am

Economy

India's merchandise trade deficit likely widens to USD 28 billion in September amid gold imports surge

India's merchandise trade deficit is expected to have widened to USD 28.0 billion in September 2025, up from USD 26.5 billion in August, according to a report by Union Bank of India. The increase in the trade gap is driven primarily by a sharp rise in gold imports, which nearly doubled month-on-month despite record-high prices. The report stated, "India's merchandise trade deficit likely widened to USD 28.0bln in Sep'25, compared to USD 26.5bln in Aug'25, driven primarily by a surge in gold imports." The report noted that the surge in gold demand was largely fueled by the onset of the festive and wedding season, which typically boosts bullion purchases. This increase occurred even as global commodity prices saw only a modest rise, with the CRY Index edging up to 301.78 in September from 296.64 the previous month. Looking ahead, the trade deficit is expected to remain elevated in the near term. Strong gold imports ahead of the festive season, firm energy demand, and continued reliance on electronics and capital goods imports are likely to keep the deficit high. While some relief may come from softening global commodity prices and ongoing import substitution initiatives, export growth remains muted amid weak global demand and tariff-related challenges. On the trade negotiations front, India and the US are making progress toward a potential first-phase trade agreement, with discussions expected to continue through November 2025.

Source: Economic Times

International News

U.S. Govt Has Started To Fire Federal Workers

The U.S. government has started to layoff federal employees, the Office of Management and Budget's chief Russell Vought said on Friday, the 10th day of the shutdown, which is the first in six years. President Donald Trump had signaled such a move, which he said was intended to reduce the excess workforce that Democrats had created. The government went into shutdown on October 1 after congressional leaders failed to reach a consensus over federal funding. The OMB had asked federal agencies to provide RIF plans. The shutdown is set to extend to next week as the Senate is set to meet next only on Tuesday. A White House official blamed the Democrats for the government and the current predicament of federal workers, reports said. The Congressional Budget Office had estimated that about 750,000 federal employees could be furloughed each day during the shutdown and the total cost of their compensation would be around $400 million.

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
13–Oct-2025 Results– HCL Tech Economic — CPI (YoY) (Sep) Global– Construction Spending (MoM) (Aug)	14–Oct-2025 Results– TechM Economic — WPI Inflation (YoY) (Sep) Global– China CPI (YoY) (Sep), US Fed Chair Powell Speaks, China CPI (YoY) (Sep)	15–Oct-2025 Results– Axis Bank, HDFC LIfe Economic— RBI MPC Meeting Minutes Global– US Core CPI &CPI (Sep)	16–Oct-2025 Results– INFY, Wipro Economic — Global– US Core Retail Sales (MoM) (Sep), PPI (MoM) (Sep)	17–Oct-2025 Results– JSW Steel Economic — Global– Eurozone CPI (YoY) (Sep), US Average Hourly Earnings (MoM) (Sep), US Nonfarm Payrolls (Sep), Unemployment Rate (Sep)
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–	23–Oct-2025 Results– Economic — Global– US Existing Home Sales (Sep), JPY National Core CPI (YOY) (Sep)	24–Oct-2025 Results– Dr Reddy Economic — Global– US S&P Global PMI (Oct), Eurozone HCOB Eurozone Services PMI (Oct), US New Home Sales (Sep)
27–Oct-2025 Results– Economic — Global– US Durable Goods Orders (MoM)	28–Oct-2025 Results– Economic — Global– US CB Consumer Confidence (Oct)	29–Oct-2025 Results– Economic— Global– US Fed Interest Rate Decision, JPY BoJ Interest Rate Decision	30–Oct-2025 Results– Cipla Economic — Global– US GDP (QoQ) (Q3), Core PCE Prices (Q3), Eurozone ECB Interest Rate Decision (Oct), China Manufacturing PMI (Oct)	31–Oct-2025 Results– BEL Economic — Global–

(Source: Investing.com and BSE)

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Disclaimer Appendix

Analyst (s) holding in the Stock : Nil

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