

Nifty Futures	Level 1	Level 2	Level 3
Resistance	25,120	25,250	25,400
Support	24,850	24,700	24,540

Indices (NSE)	Close	Pts. Chg	% Chg
Nifty 50	25,005.5	32.4	0.1
Nifty Future (Sept)	25,104.5	37.7	0.2
Nifty Future (Oct)	25,222.1	33.5	0.1
Nifty Bank	54,669.6	133.6	0.2
Nifty 100	25,638.8	41.8	0.2
Nifty 500	23,102.7	28.5	0.1
NIFTY MIDCAP 100	58,043.6	44.0	0.1

Indices (BSE)	Close	Pts. Chg	% Chg
SENSEX	81,548.7	123.6	0.2
BSE 100	26,209.6	37.8	0.1
BSE 200	11,349.1	19.2	0.2
BSE All Cap	10,612.7	14.5	0.1
BSE Midcap	46,144.8	64.6	0.1
BSE SmallCap	53,402.4	-3.9	0.0

Sectoral Indices	Close	Pts. Chg	% Chg
Bankex	61,215.0	216.0	0.4
Capital Goods	68,487.7	121.4	0.2
Realty	6,866.9	-1.6	0.0
Power	6,660.9	69.7	1.1
Oil & Gas	26,241.7	308.2	1.2
Metal	32,523.3	117.2	0.4
CD	61,757.1	-29.6	-0.1
Auto	59,715.7	-189.5	-0.3
TECK	17,348.2	-18.2	-0.1
IT	35,362.2	-208.0	-0.6
FMCG	20,932.6	31.1	0.2
Healthcare	44,801.6	127.3	0.3
India VIX	10.4	-0.2	0.0

Exchange	Advance	Decline	Unchange
BSE	2,019	2,103	203
NSE	1,457	1,537	88

Volume	Current Rs (in cr)	% Chg
NSE Cash	96,204.8	-5.7
BSE Cash	10,220.7	26.2
NSE F&O	1,07,170.7	-20.7

Net Inflows/Outflows (Rs in cr)	Buy	Sell	Net
FII	10,008.8	13,481.1	-3,472.4
DII	14,831.2	10,785.7	4,045.5

Intraday Nifty Outlook

The benchmark index opened on a flat note and consolidated in a narrow range before closing mildly positive at 25,005. On the options front, the 25,000 strike holds the highest Put OI, making it a strong immediate support zone, while heavy Call OI buildup at 25,200 and 25,500 suggests stiff resistance ahead. The index continues to hold above the 50-DMA, and the recovery from recent lows indicates short covering support. Sustaining above 25,000 could trigger further upside towards 25,250–25,500, whereas a fall below 24,850 may invite fresh weakness.

Corporate News

Bharat Forge signs pact with UK's Windracers to deploy cargo UAVs in India

Forging and advanced engineering company Bharat Forge on Thursday said it has signed an agreement with the UK-based autonomous cargo drone manufacturer Windracers Limited for a collaboration on deployment, localisation and application of the latter's Unmanned Aerial Vehicle (UAV) ULTRA across India. The Memorandum of understanding, signed between the two companies at the ongoing global defence exhibition and conference, DSEI UK 2025 in London, aligns with Bharat Forge's and Windracers' broader aerospace growth strategy of advancing UAV capabilities in India, supporting innovation, technology transfer and strategic aerospace applications across defence, the company said. The MoU begins with an initial two-year term, offering both companies the opportunity to advance localisation, conduct joint trials and shape a definitive agreement for deployment in India, Bharat Forge said. The partnership builds on the UK-India Free Trade Agreement (FTA), advancing aerospace technology transfer and innovation in both countries, and aligns with the goals of India-UK Vision 2035, it stated.

Source : Business Standard

JSW Infrastructure Invests ₹57.43 Crores in Ballari Rail Siding

JSW Infrastructure Limited has announced an investment of ₹57.43 crores for the acquisition of a brownfield Rail Siding in Kudathini, Ballari, Karnataka, through its subsidiary JSW Port Logistics Private Limited. The acquisition aims to expand JSW Infrastructure's logistics network and enhance multimodal connectivity. The acquired site spans over 85.71 acres and was previously owned by Hothur Ispat Private Limited. This strategic move is expected to bolster JSW Infrastructure's position as a leading integrated logistics player. The Kudathini siding is being developed into a state-of-the-art Multi-Modal Logistics Park (MMLP), featuring modern land infrastructure, container handling systems, a Rail Freight Terminal (RFT), and a fully equipped Inland Container Depot (ICD). Commercial operations are expected to commence within the next six months, with a phased ramp-up. The total capital expenditure for the project is estimated at ₹380 crores, including the ₹57.43 crores for the acquisition. This investment will be deployed over the next few years to fully develop the site into a comprehensive logistics hub.

Source : Moneycontrol

Reliance Consumer to invest ₹1,500 crore in Nagpur food unit by 2026

FMCG firm Reliance Consumer Products Ltd (RCPL) will invest over Rs 1,500 crore to set up an integrated facility for food products & beverages at Katol in Maharashtra. RCPL, the FMCG arm of billionaire Mukesh Ambani-led Reliance Industries, has signed a Memorandum of Understanding (MoU) with the Maharashtra government to set up the unit in Nagpur. The unit will provide direct employment to more than 500 people, according to a video posted on the social media account of Maharashtra Chief Minister Devendra Fadnavis. The proposed manufacturing unit will commence manufacturing in 2026. As per the agreement, the state government will facilitate RCPL to obtain necessary approvals, clearances and financial incentives. In its annual general meeting last month, Reliance had announced that it "will invest Rs 40,000 crore (USD 4.7 billion) to create Asia's largest integrated food parks with AI-driven automation, robotics, and sustainable technologies, securing lasting cost leadership.

Source : Business Standard

Morning Wealth

Nifty Top 5 Gainers	Close	Pts. Chg	% Chg
SHRIRAMFIN	620.1	15.3	2.5
ADANIENT	2,398.8	58.6	2.5
NTPC	331.1	5.4	1.7
AXISBANK	1,087.4	17.3	1.6
POWERGRID	286.8	3.9	1.4

Nifty Top 5 Losers	Close	Pts. Chg	% Chg
INFY	1,509.7	-22.9	-1.5
BAJAJ-AUTO	9,113.5	-130.5	-1.4
EICHERMOT	6,758.0	-78.5	-1.2
SBILIFE	1,814.2	-19.5	-1.1
TITAN	3,584.2	-36.4	-1.0

Int. Indices	Close	Pts. Chg	% Chg
S&P 500	6,587.5	55.4	0.8
Dow Jones	46,108.0	617.1	1.3
Nasdaq	22,043.1	157.0	0.7
FTSE 100	9,297.6	72.2	0.8
DAX	23,703.7	70.7	0.3
CAC 40	7,823.5	62.2	0.8
Nikkei 225	44,735.5	363.0	0.8
Hang Seng	26,457.5	371.2	1.4

ADR	Close	Pts. Chg	% Chg
HDFC Bank ADR	35.4	0.2	0.5
ICICI Bank ADR	32.0	0.3	1.0
Infosys ADR	17.1	0.1	0.5
Wipro ADR	2.8	0.0	-0.7

Currencies	Close	Pts. Chg	% Chg
Dollar Index*	97.6	-0.2	-0.2
USD/INR	88.3	0.1	0.2
EURO/INR	103.2	0.0	0.0
USD/YEN*	147.4	0.0	0.0

Commodities	Close	Pts. Chg	% Chg
Gold (spot) Rs	1,08,979.0	-7.0	0.0%
Silver (spot) Rs	1,26,951.0	1,771.0	1.4%
Crude (Brent) \$*	65.9	-0.4	-0.8%
Crude Oil (WTI) \$*	61.9	-0.5	-0.8%

*rates as at 8.30 am

Economy

Ethanol blending saved Rs 1.44 lakh crore in forex: Prahlad Joshi

Union Minister of Consumer Affairs, Food and Public Distribution Prahlad Joshi on Thursday underscored India's progress in sugarcane and ethanol production, crediting it with strengthening both the energy and economic sectors. Speaking at The India Sugar & Bio-Energy Conference, Prahlad Joshi said, "In the last 11 years, sugarcane production has risen by 40%. In 2014, India's ethanol blending was just 1.5%, and today it stands at 20%." Highlighting the economic impact, he added, "Our dependence on ethanol blending has saved Rs 1.44 lakh crore in foreign exchange on crude oil imports." Looking ahead, the minister urged the industry to push boundaries: "I would encourage biofuel producers to increase ethanol production and enhance exports too." Meanwhile, addressing the inaugural of the states' review meeting of the PM Surya Ghar Muft Bijli Yojana and PM-KUSUM schemes, New & Renewable Energy Minister Prahlad Joshi said, "Now (rooftop installation at) 20 lakh (households) is completed and very shortly we will be adding another 30 lakh. Overall, our target is one crore households (under the scheme)." He further informed that he has approved a utility-led model for all those people who don't have a roof over their heads. "Some states have planned to do it (install rooftop solar) at a very fast pace. One of such states is Andhra Pradesh.

Source : Moneycontrol

International News

U.S. Consumer Prices Climb 0.4% In August, Slightly More Than Expected

Following yesterday's report showing an unexpected dip by producer prices, the Labor Department released a separate report on Thursday showing U.S. consumer prices rose by slightly more than expected in the month of August. The Labor Department said its consumer price index climbed by 0.4 percent in August after inching up by 0.2 percent in July. Economists had expected consumer prices to rise by 0.3 percent. The report also said the annual rate of consumer price growth accelerated to 2.9 percent in August from 2.7 percent in July, in line with economist estimates. The slightly bigger than expected monthly increase by consumer prices partly reflected a continued advanced by shelter costs, which rose by 0.4 percent in August after edging up by 0.2 percent in July. Energy prices also grew by 0.7 percent during the month amid a surge by prices for gasoline, while food prices climbed by 0.5 percent. The Labor Department said core consumer prices, which exclude food and energy prices, rose by 0.3 percent in August, matching the increase seen in July as well as expectations. The annual rate of core consumer price growth in August was unchanged from the previous month at 3.1 percent, in line with economist estimates. The monthly increase by core consumer prices reflected the higher prices for shelter as well as higher prices for airline fares, used cars and trucks, apparel, and new vehicles. Meanwhile, the report said prices for medical care, recreation, and communication were among the few that decreased in August.

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 08-Sep-2025	Tuesday 09-Sep-2025	Wednesday 10-Sep-2025	Thursday 11-Sep-2025	Friday 12-Sep-2025
Results—	Results—	Results—	Results—	Results—
Economic —	Economic —	Economic—	Economic —	Economic —
Global– US Consumer Credit (Jul)	Global– China CPI (YoY) (Aug)	Global– US PPI (MoM) (Aug)	Global– Euro ECB Interest Rate Decision (Sep), US Core CPI (MoM) (Aug)	Global– Japan Industrial Production (MoM) (Jul), EUR GDP
15-Sep-2025	16-Sep-2025	17-Sep-2025	18-Sep-2025	19-Sep-2025
Results—	Results—	Results—	Results—	Results—
Economic — WPI Food, Fuel inflation	Economic —	Economic—	Economic —	Economic —
Global– EUR Trade Balance (Jul)	Global– EUR Unemployment Rate (Jul), US Core Retail Sales (MoM) (Aug)	Global– EUR CPI Aug, US Fed interest rate cut decision	Global– BOE interest rate decision, BOJ Interest rate decision	Global–
20-Sep-2025	21-Sep-2025	22-Sep-2025	23-Sep-2025	24-Sep-2025
Results—	Results—	Results—	Results—	Results—
Economic —	Economic —	Economic—	Economic —	Economic —
Global–	Global–	Global–	Global– US S&P Global Manufacturing PMI (Sep), S&P Global Manufacturing PMI (Sep), S&P Global Services PMI (Sep), US Existing Home Sales (Aug)	Global– US New Home sales (MOM) (Aug), US GDP (QOQ) (Q2), US Core Durable Goods Orders (Aug)

(Source: Investing.com and BSE)

Research Desk

Tel: +91 22 61596138

Institutional Sales Desk

Tel: +91 22 61596403/04/05

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Analyst (s) holding in the Stock : Nil

Analyst (s) Certification:

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Corporate Office:

4th floor,
Rustom Bldg,
29, Veer Nariman Road, Fort,
Mumbai-400001
Phone- +91 22 6159 6138
Fax-+91 22 6159 6160
Website- www.bpwealth.com

Registered Office:

24/26, 1st Floor, Cama Building,
Dalal street, Fort,
Mumbai-400001

BP Equities Pvt. Ltd.
CIN No: U67120MH1997PTC107392