

| Nifty Futures | Level 1 | Level 2 | Level 3 |
|---------------|---------|---------|---------|
| Resistance | 25,200 | 25,360 | 25,500 |
| Support | 25,000 | 24,850 | 24,700 |

| Indices (NSE) | Close | Pts. Chg | % Chg |
|---------------------|----------|----------|-------|
| Nifty 50 | 25,114.0 | 108.5 | 0.4 |
| Nifty Future (Sept) | 25,210.1 | 105.6 | 0.4 |
| Nifty Future (Oct) | 25,327.8 | 105.7 | 0.4 |
| Nifty Bank | 54,809.3 | 139.7 | 0.3 |
| Nifty 100 | 25,745.1 | 106.4 | 0.4 |
| Nifty 500 | 23,190.3 | 87.6 | 0.4 |
| NIFTY MIDCAP 100 | 58,227.2 | 183.7 | 0.3 |

| Indices (BSE) | Close | Pts. Chg | % Chg |
|---------------|----------|----------|-------|
| SENSEX | 81,904.7 | 356.0 | 0.4 |
| BSE 100 | 26,315.0 | 105.4 | 0.4 |
| BSE 200 | 11,390.2 | 41.1 | 0.4 |
| BSE All Cap | 10,648.4 | 35.6 | 0.3 |
| BSE Midcap | 46,184.3 | 39.5 | 0.1 |
| BSE SmallCap | 53,548.5 | 146.1 | 0.3 |

| Sectoral Indices | Close | Pts. Chg | % Chg |
|------------------|----------|----------|-------|
| Bankex | 61,445.9 | 231.0 | 0.4 |
| Capital Goods | 69,691.8 | 1204.1 | 1.8 |
| Realty | 6,868.5 | 1.7 | 0.0 |
| Power | 6,690.3 | 29.4 | 0.4 |
| Oil & Gas | 26,234.4 | -7.3 | 0.0 |
| Metal | 32,781.9 | 258.7 | 0.8 |
| CD | 61,654.8 | -102.3 | -0.2 |
| Auto | 59,961.8 | 246.1 | 0.4 |
| TECK | 17,393.6 | 45.4 | 0.3 |
| IT | 35,474.1 | 111.9 | 0.3 |
| FMCG | 20,786.5 | -146.2 | -0.7 |
| Healthcare | 44,922.6 | 121.0 | 0.3 |
| India VIX | 10.1 | -0.2 | 0.0 |

| Exchange | Advance | Decline | Unchange |
|----------|---------|---------|----------|
| BSE | 1,974 | 2,170 | 190 |
| NSE | 1,488 | 1,505 | 94 |

| Volume | Current Rs (in cr) | % Chg |
|----------|--------------------|-------|
| NSE Cash | 92,241.5 | -4.1 |
| BSE Cash | 7,329.1 | -28.3 |
| NSE F&O | 1,07,170.7 | 0.0 |

| Net Inflows/Outflows (Rs in cr) | Buy | Sell | Net |
|---------------------------------|----------|----------|---------|
| FII | 11,094.2 | 10,964.6 | 129.6 |
| DII | 11,675.3 | 10,119.2 | 1,556.0 |

Intraday Nifty Outlook

The benchmark index ended the previous session on a positive note, closing near the 25,100 zone after reclaiming short-term resistances. The index witnessed a gap-up opening and sustained momentum through the day, indicating buying interest returning at lower levels. Price has now moved above the 20-day moving average and is testing the resistance band of 25,100–25,250. Sustained trade above this zone can open the path towards 25,500, while the immediate support lies at 25,000 followed by 24,850. The broader structure indicates a shift from consolidation to recovery, with the recent gap area acting as a strong base for bulls.

Corporate News

Shakti Pumps wins ₹374 crore order for off-grid solar water pumps

Shakti Pumps (India) Limited has secured a fresh order worth ₹374 crore from the Maharashtra State Electricity Distribution Company Limited (MSEDCL) for the supply and installation of 34,720 off-grid solar water pumping systems under the government's Magel Tyala Saur Krushi Pump Yojana / PM-KUSUM B scheme. The latest tranche, comprising 12,451 systems valued at ₹347.41 crore, was fully booked by farmers across Maharashtra, reflecting strong demand for Shakti Pumps' technology. This follows a first tranche of 10,000 systems, worth about ₹268.88 crore, which was also quickly taken up. With 22,451 systems already committed across both tranches, the company has now logged total orders worth over ₹616 crore towards its empanelled capacity of 34,720 pumps. Chairman Dinesh Patidar said the company's long-standing presence in Maharashtra and strong execution record place it in a good position to deliver on the order within deadlines. "We remain committed to empowering farmers with sustainable and energy-efficient water solutions that enhance agricultural productivity," he added.

Source : CNBC TV18

Apollo Hospitals Acquires Stake Worth Rs 1,254 Crore In Subsidiary; Sets Up Rs 573-Crore Oncology Centre

Apollo Hospitals Enterprise Ltd. on Friday announced that it will acquire 31% stake held by International Finance Corporation in Apollo Health and Lifestyle Ltd., the company's subsidiary, for Rs 1,254 crore. Following the transaction, Apollo Health and Lifestyle will become a 100% subsidiary of the company with 99.42% stake and balance in the ESOP pool. The company, after the acquisition, plans to focus on primary care and diagnostics, birthing and women's health centres, ambulatory care centres and dialysis and dental networks. The hospital also announced plans to set up 100-bed comprehensive oncology centre at Gurugram for Rs 573 crore. The centre will be set up in two phases, with the first phase expected to be completed by the end of the fourth quarter of this fiscal or the first quarter of the next financial year. In the second phase the Proton & Integrated Cancer Centre will be opened. The project is expected to be completed over the next four years.

Source : NDTV Profit

RailTel wins multiple orders worth over ₹600 cr from Bihar Education Project Council

RailTel Corporation of India Ltd has received a Letter of Acceptance worth ₹209.79 crore from the Bihar Education Project Council for implementing the Education Quality Enhancement initiative under PM SHRI. The project is scheduled for completion by September 2026. The company said the order involves supply and implementation services aimed at strengthening educational infrastructure across the state. It will cover ICT labs, Integrated Science and Mathematics labs, smart classrooms, and teaching material supply, enhancing access to modern learning tools for schools across Bihar.

Source : CNBC TV18

Morning Wealth

| Nifty Top 5 Gainers | Close | Pts. Chg | % Chg |
|---------------------|---------|----------|-------|
| BEL | 399.3 | 14.2 | 3.7 |
| BAJFINANCE | 1,003.3 | 33.0 | 3.4 |
| BAJAJFINSV | 2,081.5 | 43.7 | 2.1 |
| HINDALCO | 758.1 | 15.4 | 2.1 |
| SHRIRAMFIN | 632.9 | 12.8 | 2.1 |

| Nifty Top 5 Losers | Close | Pts. Chg | % Chg |
|--------------------|---------|----------|-------|
| ETERNAL | 321.4 | -6.7 | -2.0 |
| HINDUNILVR | 2,580.5 | -41.5 | -1.6 |
| BAJAJ-AUTO | 8,999.5 | -114.0 | -1.3 |
| INDUSINDBK | 740.5 | -8.1 | -1.1 |
| TRENT | 5,130.0 | -41.0 | -0.8 |

| Int. Indices | Close | Pts. Chg | % Chg |
|--------------|----------|----------|-------|
| S&P 500 | 6,584.3 | -3.2 | 0.0 |
| Dow Jones | 45,834.2 | -273.8 | -0.6 |
| Nasdaq | 22,141.1 | 98.0 | 0.4 |
| FTSE 100 | 9,283.3 | -14.3 | -0.2 |
| DAX | 23,698.2 | -5.5 | 0.0 |
| CAC 40 | 7,825.2 | 1.7 | 0.0 |
| Nikkei 225 | 44,768.1 | 395.6 | 0.9 |
| Hang Seng | 26,530.5 | 142.3 | 0.5 |

| ADR | Close | Pts. Chg | % Chg |
|----------------|-------|----------|-------|
| HDFC Bank ADR | 35.1 | -0.3 | -0.9 |
| ICICI Bank ADR | 32.1 | 0.1 | 0.3 |
| Infosys ADR | 17.0 | -0.1 | -0.6 |
| Wipro ADR | 2.8 | 0.0 | -0.7 |

| Currencies | Close | Pts. Chg | % Chg |
|---------------|-------|----------|-------|
| Dollar Index* | 97.6 | 0.0 | 0.0 |
| USD/INR | 88.3 | 0.0 | 0.0 |
| EURO/INR | 103.4 | 0.2 | 0.2 |
| USD/YEN* | 147.5 | 0.0 | 0.0 |

| Commodities | Close | Pts. Chg | % Chg |
|---------------------|------------|----------|-------|
| Gold (spot) Rs | 1,09,356.0 | 375.0 | 0.3% |
| Silver (spot) Rs | 1,28,840.0 | 1,902.0 | 1.5% |
| Crude (Brent) \$* | 67.3 | 0.3 | 0.5% |
| Crude Oil (WTI) \$* | 63.0 | 0.3 | 0.5% |

*rates as at 8.30 am

Economy

Indian envoy to US discusses bilateral trade ties with US lawmakers

India's Ambassador to the US Vinay Mohan Kwatra discussed bilateral trade relations with several key American lawmakers and underlined Delhi's support to efforts to bring an end to the Ukraine conflict through dialogue and diplomacy. "Took the opportunity to brief" Representative James Moylan on recent developments in India-US trade partnership and energy cooperation. "We also shared views on mutual interests in the Indo-Pacific. Reiterated India's support for resolution of Ukraine conflict through dialogue and diplomacy," Kwatra said in a post on X on Friday(local time). Kwatra also spoke with Congressman Greg Steube, briefing him on issues of mutual interest including bilateral trade, especially in energy, and spoke about India's support to all efforts to bring an end to the conflict in Ukraine through dialogue and diplomacy. He also held discussion with Representative Young Kim, Chairperson of East Asia and Pacific Subcommittee of the House Committee on Foreign Affairs. "Shared correct perspective of India's relationship with China. Also spoke about issues that are our shared priority in the Indo-Pacific, and the opportunities of working together in the region," Kwatra said.

Source : Economic Times

International News

U.S. Consumer Sentiment Deteriorates Much More Than Expected In September

Preliminary data released by the University of Michigan on Friday showed consumer sentiment in the U.S. has deteriorated by much more than anticipated in the month of September. The University of Michigan said its consumer sentiment index fell to 55.4 in September from 58.2 in August. Economists had expected the index to edge down to 58.0. "Consumers continue to note multiple vulnerabilities in the economy, with rising risks to business conditions, labor markets, and inflation," said Surveys of Consumers Director Joanne Hsu. "Likewise, consumers perceive risks to their pocketbooks as well." "Trade policy remains highly salient to consumers, with about 60% of consumers providing unprompted comments about tariffs during interviews," she added. "Still, sentiment remains above April and May 2025 readings, immediately after the initial announcement of reciprocal tariffs." The bigger than expected decrease by the headline index partly reflected a notable deterioration in consumer expectations, with the index of consumer expectations sliding to 51.8 in September from 55.9 in August. The current economic conditions index showed a more modest decrease, slipping to 61.2 in September from 61.7 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 15-Sep-2025 | Tuesday 16-Sep-2025 | Wednesday 17-Sep-2025 | Thursday 18-Sep-2025 | Friday 19-Sep-2025 |
|---|---|---|---|---|
| Results— Economic — WPI Food, Fuel inflation Global— EUR Trade Balance (Jul) | Results— Economic — Global— EUR Unemployment Rate (Jul), US Core Retail Sales (MoM) (Aug) | Results— Economic— Global— EUR CPI Aug, US Fed interest rate cut decision | Results— Economic — Global— BOE interest rate decision, BOJ Interest rate decision | Results— Economic — Global— |
| 20-Sep-2025 Results— Economic — Global— | 21-Sep-2025 Results— Economic — Global— | 22-Sep-2025 Results— Economic— Global— | 23-Sep-2025 Results— Economic — 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) | 24-Sep-2025 Results— Economic — Global— US New Home sales (MOM) (Aug), US GDP (QOQ) (Q2), US Core Durable Goods Orders (Aug) |
| 25-Sep-2025 Results— Economic — Global— US Durable Goods Orders (MOM) (Aug), US GDP (QOQ) (Q2) | 26-Sep-2025 Results— Economic — Global— US Core PCE Price Index (MOM) (Aug) | 27-Sep-2025 Results— Economic— Global— | 28-Sep-2025 Results— Economic — Global— | 29-Sep-2025 Results— Economic — Global— CNY Manufacturing PMI (Sep) |

(Source: Investing.com and BSE)

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