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Friday, 31 October'25

Markets at Glance

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Scorecard | Daily Digest | Spotlight Today | IPO Desk

Indian Market & Key Indicators

Index/Indicator Name	Current Value	Change (pts)	Change (%)
GIFT NIFTY	26,038.00	+15.50	+0.06%
NIFTY50	25,877.85	-176.05	-0.68%
SENSEX	84,404.46	-592.67	-0.70%
BANK NIFTY	58,031.10	-354.15	-0.61%
NIFTY MIDCAP 100	60,096.25	-52.80	-0.09%
NIFTY SMALLCAP 100	18,469.70	-17.85	-0.10%

Key Market Indicators

Index/Indicator Name	Current Value	Change (pts)	Change (%)
GOLD	121,508.00	+842.00	0.70%
SILVER	148,840.00	+2759.00	1.89%
INDIA VIX	12.07	+0.10	+0.81%
USD/INR	88.59	+0.00	+0.00%
DOLLAR INDEX (DXY)	99.48	-0.05	-0.05%

US Markets

Market Index	Current Value	Change (pts)	Change (%)
S&P 500	6,822.34	-68.25	-0.99%
NASDAQ COMPOSITE	23,581.14	-377.33	-1.57%
DOW JONES	47,522.12	-109.88	-0.23%

Europe Markets

Market Index	Current Value	Change (pts)	Change (%)
DAX (GERMANY)	24,118.89	-5.32	-0.02%
FTSE 100 (UK)	9,760.10	+3.96	+0.04%

Asian Markets

Market Index	Current Value	Change (pts)	Change (%)
NIKKEI (JAPAN)	51,948.26	+622.65	+1.21%
HANG SENG (HONG KONG)	26,140.49	-142.20	-0.54%
SHANGHAI COMPOSITE (CHINA)	3,965.45	-21.45	-0.54%

Cryptocurrency (USD)

Market Index	Current Value	Change (pts)	Change (%)
BITCOIN	108,904.79	+616.52	+0.57%
ETHEREUM	3,826.16	+22.91	+0.60%
SOLANA	184.61	-0.03	-0.01%

Yesterday's Scorecard | NIFTY 500

Top Gainers

Company Name	Change (%)
CHENNAI PETROLEUM C...	+8.44%
SAGILITY INDIA	+7.90%
PB FINTECH	+6.88%
BHARAT HEAVY ELECTRI...	+6.73%
CREDITACCESS GRAMEEN	+5.29%

Top Losers

Company Name	Change (%)
VODAFONE IDEA	-6.52%
SARDA ENERGY & MINER...	-3.96%
IDBI BANK	-3.93%
COROMANDEL INTERNAT...	-3.80%
DR. REDDY'S LABORATO...	-3.79%

52 Week High

Company Name	LTP (₹)
CHENNAI PETROLEUM C...	₹878.00
SAGILITY INDIA	₹54.89
ADITYA BIRLA CAPITAL	₹327.00
IIFL FINANCE	₹542.05
CANARA BANK	₹132.78

52 Week Low

Company Name	LTP (₹)
TEJAS NETWORKS	₹536.25
CLEAN SCIENCE AND TE...	₹1013.50

Market Statistics

Advance	Decline
184	314

Volume Shockers

Company Name	Volume
THE INDIA CEMENTS	4.51x
SAGILITY INDIA	3.82x
BHARAT HEAVY ELECTRI...	3.36x
PB FINTECH	3.10x
FIVE-STAR BUSINESS F...	3.08x

Sector Performance & Market Flows

Top 3 Performers (1-Day)

Sector Name	Change (%)
ENERGY	+0.12%
REALTY	+0.04%
MNC	+0.02%

Bottom 3 Performers (1-Day)

Sector Name	Change (%)
BANK	-0.61%
PHARMA	-0.59%
IT	-0.51%

Top 3 Performers (7-Day)

Sector Name	Change (%)
METAL	+4.85%
COMMODITIES	+2.95%
PSU BANK	+2.62%

Bottom 3 Performers (7-Day)

Sector Name	Change (%)
AUTO	-1.47%
PHARMA	-0.97%
FMCG	-0.47%

FII DII Activity (Cash)

Period	FII (₹ Cr)	DII (₹ Cr)
30 Oct 2025	-3,078	+2,469
29 Oct 2025	-2,540	+5,693
Last 1 Week	+5,288	+11,909
Last 2 Weeks	+5,318	+19,208
Last 30 Days	+2,095	+51,487

Global Market Brief

1. **US Markets: S&P 500 fell 0.99%**, **Nasdaq dropped 1.57%**, and **Dow declined 0.23%**. Mega-cap tech stocks including Meta (−11%) and Microsoft (−3%) dragged indices amid concerns about surging AI spending despite solid earnings. (Reuters, ET)

2. **European Markets:** Performance was mixed as the **ECB kept rates unchanged**, offering no clear future guidance. The **STOXX 600 fell 0.1%**, **DAX slipped 0.02%**, **CAC 40 down 0.53%**, while the **FTSE 100 gained 0.04%**, marking a 9-day winning streak. Strong eurozone activity data was offset by weakness in financials and energy stocks. (FT, Reuters)

3. **Asian Markets:** Sentiment was mixed after the **Bank of Japan kept rates steady at 0.5%** but hinted at potential hikes. **Nikkei rose 0.04%**, **Hang Seng fell 0.24%**, and **Shanghai Composite dropped 0.73%**. Investor caution persisted amid trade uncertainties despite a US–China tariff de-escalation meeting. (ET, Financial Express)

4. **Google (Alphabet):** Reported stronger **Google Cloud Platform (GCP)** demand with 34% more customers YoY and several $1 billion+ AI infrastructure deals. (Google Blog, Reuters)

5. **Amazon** reported its fastest AWS growth since 2022 and a strong Q3 earnings beat. (@CNBCTV18Live)

6. **Apple** forecast record holiday sales after Q4 results beat estimates, despite weak China revenue. (@CNBCTV18Live)

DAILY DIGEST — October 31, 2025

Indian Market Brief

1. **Sensex fell 592 points (−0.7%)** and **Nifty slipped below 25,900** as global investors turned cautious following the US Fed's pause signal. Weak foreign fund inflows and mixed Q2 earnings weighed on sentiment. (TradingEconomics, Pulse by Zerodha)

2. The **Indian Rupee hit a 2-week low**, tracking a stronger US dollar and persistent FPI outflows. (TradingEconomics)

3. **Corporate Earnings (During market hours):**

    a. **Hyundai Motor India** Q2 profit rose **14% to ₹1,572 crore**, driven by robust exports.

    b. **Union Bank** Q2 profit fell **10%** amid lower recoveries

    c. **Canara Bank** hit a 52-week high with Q2 profit up **19% to ₹4,774 crore**.

    d. **Adani Power** Q2 profit dropped **11% YoY to ₹2,953 crore**; revenue rose marginally.

    e. **HPCL** PAT jumped **2,598% YoY to ₹3,859 crore**, driven by record refining margins; announced **₹5 interim dividend/share**, record date Nov 6.

    f. **Sagility** profit surged **114% YoY to ₹251 crore**, shares hit a 52-week high. (ET, Moneycontrol)

    g. **Hyundai Motor India** – Q2 profit up 14% to ₹1,572 Cr; among top auto performers. (@Moneycontrol)

4. **HDFC Bank** reappointed **Kaizad Bharucha** as Deputy MD for another 3 years, pending RBI nod. (Business Standard)

Macro & Geopolitical Watch

1. **Global Monetary Policy: US Fed, ECB, and BoJ** signaled a pause in rate cuts, stressing inflation control over growth. Global investors turned cautious amid persistent price pressures and uneven job data. (Reuters, ET)

2. The **Indian government relaxed green cover norms** — industrial estates now need to allocate **10% (down from 33%)** land for plantation, individual industries **15%**, easing project approvals. (ET)

3. **India–Iran–US Trade:** The US has granted India a 6-month waiver on sanctions related to the Chabahar Port in **Iran**, extending the exemption until early 2026. The move, confirmed by India's Ministry of External Affairs, **allows** India to **continue** its operations at the port, which is a vital trade route to Afghanistan and Central Asia that bypasses Pakistan. India Ports Global Limited (IPGL), which signed a 10-year contract in May 2024 to operate the Shahid Beheshti terminal at Chabahar, can now continue its work without facing US penalties. (Business Standard)

Business & Corporate News

1. **IOCL:** Seeking **up to 24 million barrels of crude from the Americas**, diversifying supply amid Russian import limits. (Business Standard)

2. **India–China Supply Chain:** Select Indian companies received **licenses from China to import rare earth magnets**, crucial for EV and electronics manufacturing. (Business Standard)

3. **DLF Ltd**: Sales bookings surged nearly sixfold to ₹4,332 crore, led by strong demand for its Mumbai project. **[Economic Times]**

4. **Reliance Industries** – Through Reliance Intelligence Ltd, the company partnered with **Google** to advance AI adoption in India under its "AI for All" vision. Free Gemini Pro access to Reliance Jio users (Exchange filing)

5. **Bharat Electronics** – Won **₹732 crore** in new orders for radios, tank systems, missile components, cybersecurity solutions, and more. (Exchange filing)

6. **Narayana Hrudayalaya** – Its UK arm agreed to **acquire 100% of Practice Plus Group Hospitals Ltd (UK)**, pending closing conditions. (Exchange filing)

7. **Sunteck Realty** – Subsidiary **Apricum Buildwell** to acquire **Shreejikrupa Hotels and Properties Pvt Ltd**, which owns land in **Andheri, Mumbai**. (Exchange filing)

8. **V2 Retail** – Opened its **QIP issue** at a floor price of ₹2,245.75 per share; issue size may reach **₹400 crore**. (CNBC-TV18)

9. **MTAR Technologies** – Secured an **international order worth ₹263.54 crore** from an existing client. (Exchange filing)

Positive / Strong Results

1. **Welspun Corp** profit surged **57% to ₹443 crore** on strong steel sales.

2. **ITC** Q2 PAT up **3% to ₹5,126 crore**, but revenue declined **1% YoY**.

3. **United Spirits** Q2 FY26 profit up **41% YoY to ₹472 crore** on strong premium segment sales.

4. **SAIL (H1 FY26):** Profit after tax rose **32% YoY to ₹1,112 crore**; revenue grew to **₹52,600 crore** (+8%), with sales volume up 16.7%. (PIB, Business Standard)

5. **Cipla (Q2 FY26):** Revenue **grew** 8% YoY, and net profit **increased** 4% YoY to ₹1,353 crore. Posted its **highest-ever quarterly revenue >₹7,500 crore**; growth led by chronic and respiratory drugs in India. Plans 4 **respiratory launches by 2026**, including **generic Advair (gAdvair)**. (ET)

6. **Gravita India** – Q2 net profit **up** 33% YoY to ₹96 Cr; EBITDA up 62% to ₹102 Cr (margin 9.9%), led by recycling growth. (@CNBC)

7. **Mphasis** – Q2 net profit **up** 6% QoQ to ₹469 Cr; revenue **up** 4.6% to ₹3,902 Cr. (@CNBCTV18Live)

8. **Hyundai Motor India**: Revenue **increased** 1% YoY to ₹17,461 crore and net profit **rose** 14% YoY to ₹1,572 crore. **[CNBC TV18]**

9. **Dabur India**: Revenue **rose** 5% YoY to ₹3,191 crore, and net profit grew 7% YoY to ₹445 crore.**[Moneycontrol]**

Negative / Weak Results

1. **Adani Power**: Revenue **rose** 1% YoY to ₹13,457 crore, but net profit **declined** 11% YoY to ₹2,953 crore. **[LiveMint]**

2. **NTPC** Q2 revenue remained flat YoY; while net profit **fell** 4% YoY to ₹5,067 crore; declared **₹2.75/share interim dividend**.

3. **DLF** – Q2 net profit **down 15**% YoY; revenue **down** 17%; EBITDA margin at 17% due to delayed launches. (@CNBC)

4. **Dabur India** – Q2 profit **up** 6.5% YoY to ₹445 Cr but missed estimates; rural demand weak. (@CNBC)

5. **Swiggy** – Q2 loss **widened** to ₹1,092 Cr; revenue **up** 54%; plans ₹10,000 Cr fundraise. (@Mint / @BL / @Moneycontrol)

6. **Motilal Oswal** – Q2 profit **down** 68% YoY; revenue **up** 54% but provisions impacted results. (@Moneycontrol)

7. **Bandhan Bank** – Q2 profit **plunged** 88% to ₹112 Cr; NII down 12%. (@Moneycontrol)

8. **TRF** – Net sales **down** 31.6% YoY to ₹22.34 Cr for September quarter. (@Moneycontrol)

Key Startup News (India)

1. **Swiggy** plans to **raise ₹10,000 crore** via QIP to strengthen its balance sheet and expansion plans. (ET)
2. **Lenskart Solutions** IPO worth **₹7,278 crore** opens **today (Oct 31)** with a price band of ₹382–402/share. Despite a sharp drop in grey market premium, analysts cite strong fundamentals. (Moneycontrol)
3. Crypto exchanges **Binance, CoinDCX, Mudrex, Canton** – Engaged with Indian regulators for crypto and Web3 policy clarity. (@Moneycontrol)
4. **Ixigo** shares tumbled **17% post-Q2 results**, reflecting weaker profitability and sector-wide caution. (Financial Express)

Key Events to Watch Today

1. **Gift Nifty** indicates a mildly positive open; Asia trades mixed with the Nikkei at a record high. (@Livemint / @Moneycontrol)
2. **Corporate Earnings:** Q2 FY26 results due from **BPCL, Bank of Baroda, GAIL (India), Maruti Suzuki**, and **Shriram Finance** — key indicators for PSU, auto, and financial sectors. (Financial Express)

3. **Lenskart Solutions IPO** opens for subscription. (Moneycontrol)

4. Orkla India IPO **closes** today; fully subscribed ₹1,668 Cr issue. (@Upstox)

Spotlight Today

Stocks in F&O Ban (0 stocks)

No stocks in F&O ban for today

Result Calendar

1. Maruti Suzuki India	18. R R Kabel
2. Bharat Electronics	19. Aptus Value Housin...
3. Vedanta	20. Sammaan Capital
4. Bharat Petroleum	21. Intellect Design Arena
5. Bank Of Baroda	22. Medplus Health Ser...
6. Shriram Finance	23. Mahindra Lifespace...
7. GAIL India	24. Prism Johnson
8. Godrej Consumer P...	25. Strides Pharma Scie...
9. Patanjali Foods	26. Equitas Small Finan...
10. Schaeffler India	27. Mahindra Holidays ...
11. Phoenix Mills	28. Dhanuka Agritech
12. Balkrishna Industries	29. RattanIndia Power
13. ACC	30. Bajaj Electricals
14. Dr Lal PathLabs	31. LG Balakrishnan an...
15. Kalpataru Projects I...	32. Northern Arc Capital
16. Zensar Technologies	33. Tatva Chintan Phar...
17. Jubilant Pharmova	34. NOCIL

... and more companies

IPO DESK

COMPANY	PRICE	SIZE	LOT	TIMELINE	BUSINESS
Lenskart Solutions Ltd Mainline	**₹382 - ₹402**	**₹7,278.02 Cr**	**37**	**Subscription period:** Oct 31, 2025 to Nov 04, 2025 **Listing date:** 10/11/2025	A technology-driven eyewear company designing, manufacturing, and retailing prescription glasses globally.
Orkla India IPO Mainline	**₹695 - ₹730**	**₹1,667.54 Cr**	**20**	**Subscription period:** Oct 29, 2025 to Oct 31, 2025 **Listing date:** 06/11/2025	Manufactures and markets a variety of packaged Indian food products.
Studds Accessories Ltd IPO Mainline	**₹557 - ₹585**	**₹455.49 Cr**	**25**	**Subscription period:** Oct 30, 2025 to Nov 03, 2025 **Listing date:** 07/11/2025	Designs, manufactures, and sells helmets and motorcycle accessories globally.
Safecure Services Ltd SME	**₹102**	**₹30.60 Cr**	**1200**	**Subscription period:** Oct 29, 2025 to Oct 31, 2025 **Listing date:** 06/11/2025	Provides private security, e-surveillance, facility management, ATM maintenance, and corporate interior fit-out.

DAILY WISDOM

Quote of the Day

"I believe that every right implies a responsibility; every opportunity, an obligation; every possession, a duty."

— John D. Rockefeller

Word of the Day

PAYOUT RATIO

The payout ratio is the percentage of a company's earnings that it distributes to shareholders as dividends. Essentially, it tells you how generous a company is with its profits—are they sharing the wealth or reinvesting it back into the business for growth? A high payout ratio indicates a company is returning a significant portion of its earnings to shareholders, while a low ratio may suggest it's focusing on expansion or safeguarding against future risks. Take, for instance, Reliance Industries, which has historically maintained a moderate payout ratio.

By balancing dividends with reinvestment in its telecom and retail ventures, it keeps investors happy while fueling growth. Think of the payout ratio as a company's financial dessert—too much can spoil the appetite for growth, but just the right slice keeps everyone satisfied and coming back for more.

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