MORNING
REPORT

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DAILY NEWSLETTER

01 October, 2025

BUSINESS STANDARD

* Mumbai property registrations rise 29% in September, hit 7-year high
* India's M&A deal value falls 10% in September quarter on valuation caution
* Ozempic gets CDSCO approval, Novo Nordisk set for India launch soon
* TaMo invests Rs120cr in Freight Tiger, raises total commitment to Rs270cr

FINANCIAL EXPRESS

* US tariff on Indian pharma: Nomura sees USD100mn tariff risk for Sun Pharma
* Fiscal deficit at 38% of FY26 target in April-August
* Sept retail auto sales dip 13%, festive rush revives hopes
* BHEL in focus: secures Rs15,000cr order from MP, wins GST relief

ECONOMIC TIMES

* India's road construction likely to slide to a 5-year low of 25-26 km per day in FY26: ICRA
* Gas price for Reliance-bp cut by 3%, domestic rates remain unchanged
* ICICI Bank gets Rs216cr GST demand notice
* Hero, Bajaj absorb GST hike on premium bikes to protect festive demand

MINT

* India initiates anti-dumping probe into imports of three Chinese goods
* Oil slips as OPEC plan adds to expectations of supply surplus
* TVS Supply Chain Solutions expands footprint in North America
* RITES signs pact with Etihad Rail to enhance infrastructure, mobility ties

PROV CASH: 30 September, 2025 (Rs cr)

FIIs:	**-2327.09** (18729.97 - 21057.06)
DIIs:	**+5761.63** (16948.64 - 11187.01)
Cash Vol:	(109234.76 vs 139741.25)**-21.83%**
F&O Vol:	(70672257.01 vs 39457810.56)**+79.11%**

FIIs F&O: 30 September, 2025 (Rs cr)

NET BUY:	13462.07
INDEX FUTURES:	-2716.6
INDEX OPTIONS:	15911.77
STOCK FUTURES:	654.48
STOCK OPTIONS:	-387.58

SCRIPS IN BAN PERIOD FOR 01 October, 2025

* SAMMAANCAP

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