

# MORNING BRIEF

MARKETS - GROUND SERIES - ONE USEFUL IDEA

Wednesday, 23 September 2026  
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## WHAT MATTERS THIS MORNING

- 01 GIFT Nifty is 64 points below the previous NIFTY close (-0.27%).
- 02 Institutional flows: FII -3,810 Cr; DII +4,120 Cr.
- 03 Overnight US: S&P 500 -0.00%; Nasdaq +0.45%.
- 04 Macro moves: Crude Oil -5.86%.

## MARKET CONTEXT

| INDIA      |           |        | OVERNIGHT   |           |        |
|------------|-----------|--------|-------------|-----------|--------|
| INDEX      | CLOSE     | CHANGE | INDEX       | CLOSE     | CHANGE |
| NIFTY 50   | 23,414.30 | +0.29% | S&P 500     | 7,764.64  | -0.00% |
| Bank NIFTY | 56,470.65 | +0.20% | Nasdaq      | 27,244.28 | +0.45% |
| India VIX  | 11.25     | -1.23% | S&P Futures | 7,831.50  | -0.03% |
|            |           |        | Nikkei 225  | 65,018.95 | +1.38% |

|           |          |         |         |            |
|-----------|----------|---------|---------|------------|
| CRUDE OIL | GOLD     | USD/INR | TQQQ    | ZEC        |
| 90.17     | 4,384.80 | 95.58   | \$78.91 | \$1,604.09 |
| -5.86%    | +0.02%   | -0.14%  | +8.63%  | +8.54%     |

## GROUND SERIES WATCH

- ROBOTICS

TechCrunch Disrupt 2026: Aaron Edsinger brings Hello Robot’s Stretch 4 to life onstage  
Robots that walk, talk, dance, and perform backflips make great videos. But can they close the blinds? Help someone eat?
- MANUFACTURING

Singapore’s Nexstrom wants to bring 2D semiconductors to chip fabs  
For decades, chipmakers have sought to make semiconductors faster by shrinking silicon transistors and packing more of them...
- ROBOTICS

Five AI safety sessions every founder should have on their TechCrunch Disrupt 2026 agenda  
Would you trust an AI agent with access to your company’s systems? Put your employees in an autonomous vehicle? Deploy a...

## ONE OTHER DEVELOPMENT

- MARKETS

Elevate Campuses raises Rs 945 crore from anchor investors  
Read more: September sees biggest IPO rush in nearly 30 years as 30 mainboard issues raise Rs 38,785 crore (What’s...

## THREE IDEAS, ONE LINE EACH

- GITA

Even great souls can be bound by misplaced loyalty. Sometimes our commitments need re-examination against higher principles.
- POWER

Disdain Things You Cannot Have: Ignoring Them is the Best Revenge: By acknowledging a petty problem you give it existence and credibility.
- READING

Some experiences are impossible to understand from the outside. Don't make permanent life decisions based on imagining what something...