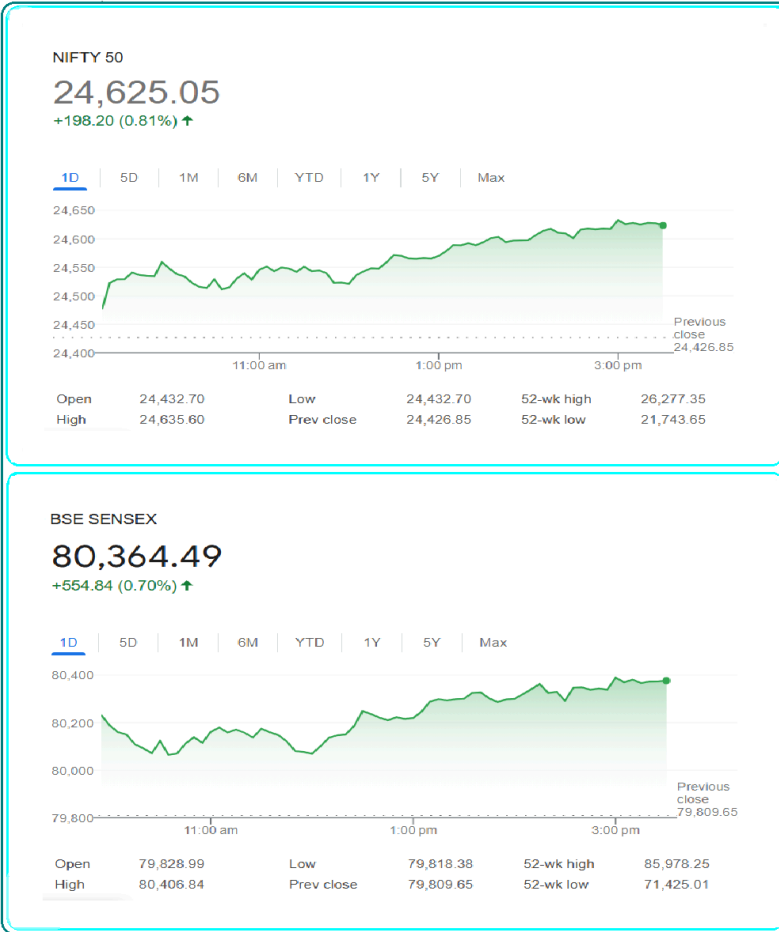


Index Chart



(Source: [Bloomberg](#))

Indian Markets

| Indices | Close | Previous | Change(%) |
|---------------------------|----------|----------|--------------|
| NIFTY 50 | 24625.05 | 24426.85 | 0.81% |
| S&P BSE SENSEX | 80364.49 | 79809.65 | 0.70% |
| NIFTY MID100 | 56825.50 | 55727.40 | 1.97% |
| NIFTY SML100 | 17498.10 | 17227.00 | 1.57% |

(Source: [NSE](#), [BSE](#))

Market Wrap Up

- Domestic equity indices ended with strong gains today, snapping a three-day losing streak, supported by robust domestic macroeconomic data. The Nifty settled above the 24,600 mark.
- The S&P BSE Sensex advanced 554.84 points or 0.70% to 80,364.49. The Nifty 50 index added 198.20 points or 0.81% to 24,625.05.
- The S&P BSE Mid-Cap index dropped 1.64% and the S&P BSE Small-Cap index shed 1.49%.
- Among the sectoral indices, the Nifty Auto index (up 2.80%), the Nifty Consumer Durables index (up 2.08%) and the Nifty Metal index (up 1.64%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 0.32%), the Nifty Pharma index (down 0.12%) and the Nifty Healthcare index (up 0.28%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **September** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **2488** contracts at the end of the day.
- Long** position build up for the **September** series has been witnessed in **BHARTIARTL, SBIN, ICICIBANK, INFY**.
- Short** position build up for the **September** series has been witnessed in **RELIANCE, LT, HDFCBANK**.
- Unwinding** position for the **September** series has been witnessed in **CDSL, CANBK**.

(Source: Capitaline F&O)

Sectoral Indices

| Indices | Close | Previous | Change(%) |
|---------------|----------|----------|-----------|
| NIFTY BANK | 54002.45 | 53655.65 | 0.65% |
| NIFTY AUTO | 25660.00 | 24960.85 | 2.80% |
| NIFTY FMCG | 56175.20 | 56141.85 | 0.06% |
| NIFTY IT | 35740.65 | 35181.25 | 1.59% |
| NIFTY METAL | 9305.30 | 9154.80 | 1.64% |
| NIFTY PHARMA | 21778.85 | 21804.05 | -0.12% |
| NIFTY REALTY | 879.80 | 870.75 | 1.04% |
| BSE CG | 66677.09 | 65417.08 | 1.93% |
| BSE CD | 61890.36 | 60638.17 | 2.07% |
| BSE Oil & GAS | 25949.17 | 25540.00 | 1.60% |
| BSE POWER | 6508.11 | 6392.75 | 1.80% |

(Source: [NSE](#), [BSE](#))

Asia Pacific Markets

| Indices | Close | Previous | Change (%) |
|----------------|----------|----------|------------|
| NIKKEI225 | 42188.79 | 42718.47 | -1.24% |
| HANG SENG | 25617.42 | 25077.62 | 2.15% |
| STRAITS TIMES | 4276.07 | 4269.70 | 0.15% |
| SHANGHAI | 3875.53 | 3857.93 | 0.46% |
| KOSPI | 3142.93 | 3186.01 | -1.35% |
| JAKARTA | 7736.07 | 7830.49 | -1.21% |
| TAIWAN | 24071.73 | 24233.10 | -0.67% |
| KLSE COMPOSITE | CLOSED | 1575.12 | - |
| ALL ORDINARIES | 9196.80 | 9243.00 | -0.50% |

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

| Market | Current | Previous |
|----------|-----------|-----------|
| NSE Cash | 84799.42 | 90936.81 |
| NSE F&O | 140343.93 | 140343.93 |

(Source: [NSE](#))

FII Activities (Crores)

| ACTIVITIES | Cash |
|------------|---------|
| NET BUY | - |
| NET SELL | 1429.71 |

(Source: [NSE](#))

Corporate News

- Maruti Suzuki India** reported a marginal decline in total sales for August, with 1,80,683 units sold compared to 1,81,782 units in the same month last year. The auto major said domestic passenger vehicle dispatches to dealers fell 8% to 1,31,278 units from 1,43,075 units a year ago. On the export front, Maruti Suzuki recorded robust growth, with shipments rising 40% to 36,538 units in August, up from 26,003 units in the same month last year.
- Maruti Suzuki** announces commencement of exports of eVITARA from Pipavav Port in Gujarat to 12 European countries. This is Suzuki's first Battery Electric Vehicle (BEV). The new models are exported to Germany, Norway, France, Denmark, Switzerland, Netherlands, Sweden, Hungary, Iceland, Austria, UK, and Belgium.
- Tata Motors** said its wholesales rose 2% year-on year to 73,178 units in August as compared to 71,693 units in the same month last year. The company's total domestic sales, however, declined 2% year-on-year to 68,482 units last month as against 70,006 units in August 2024. Total passenger vehicle dispatches in the domestic market declined 7% to 41,001 units last month from 44,142 units in August 2024. Total domestic commercial vehicle sales stood at 27,481 units last month, an increase of 6% as compared to 25,864 units in August last year.
- Bajaj Auto** has reported 5% increase in total auto sales for August 2025, selling 4.17 lakh units as against 3.97 lakh units sold in August 2024. Domestic sales aggregated to 2.32 lakh units (down 8% YoY) while exports added up to 1.85 lakh units (up 29% YoY).
- Mahindra & Mahindra** said that its overall auto sales for the month of August 2025 stood at 75,901 vehicles, a flat growth including exports. The company's total sales for August 2024 were 75,883 vehicles. In the Utility Vehicles segment, Mahindra sold 39,399 vehicles in the domestic market, a de-growth of 9% on year-over-year (YoY) basis. Including exports, the total count for Utility segment was 40,846 vehicles. The domestic sales for Commercial Vehicles stood at 22,427 units, up 11% YoY.

Top Gainers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|---------|----------|------------|
| BAJAJ-AUTO | 8967.00 | 8631.50 | 3.89% |
| M&M | 3315.40 | 3199.50 | 3.62% |
| TATAMOTORS | 690.15 | 669.00 | 3.16% |
| HEROMOTOCO | 5244.00 | 5087.70 | 3.07% |
| EICHERMOT | 6280.00 | 6103.00 | 2.90% |

(Source: [Moneycontrol](#))

Top Losers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|---------|----------|------------|
| SUNPHARMA | 1563.30 | 1594.50 | -1.96% |
| ITC | 405.85 | 409.75 | -0.95% |
| HINDUNILVR | 2649.50 | 2659.80 | -0.39% |
| TITAN | 3618.60 | 3628.80 | -0.28% |
| RELIANCE | 1353.90 | 1357.20 | -0.24% |

(Source: [Moneycontrol](#))

- TVS Motor Company** registered a 30% increase on a year-on-year basis in its total sales. It posted sales of 509,536 units in August 2025. This is against 391,588 units sold in August 2024. Total two-wheelers registered a growth of 30% with sales increasing from 378,841 units in August 2024 to 490,788 units August 2025. The company's total exports registered a growth of 35% with sales increasing from 99,976 units in August 2024 to 135,367 units in August 2025.
- Royal Enfield** reported a 55% jump in total sales to 1,14,002 units in August compared to the same month last year. The company had sold 73,629 units in August 2024. Domestic sales last month stood at 1,02,876 units against 65,623 units in August 2024, up 57%. Exports rose 39% to 11,126 units as compared to 8,006 units in the year-ago month.
- Ashok Leyland** reported a 5% increase in total commercial vehicle sales to 15,239 units in August 2025, up from 14,463 units sold in August 2024. The company's total domestic sales rose 2% year-on-year to 13,622 units in August 2025. Domestic sales of medium and heavy commercial vehicles (M&HCV) increased 3% to 7,991 units, while light commercial vehicle (LCV) sales grew 1% to 5,631 units in August 2025 compared to the same month last year.
- Hyundai Motor India** faced a sales dip of 4.23% in August, totaling 60,501 units. Domestic sales reached 44,001 units, while exports climbed to 16,500 units. Exports surged by 21% year-on-year, signaling positive momentum.
- PwC India** has broadened its reach by inaugurating a new office in Nagpur, marking its 21st location nationwide. This expansion aligns with PwC's Vision 2030, aiming to triple revenue and cultivate a 50,000-strong workforce in five years.
- Hitachi Energy** is investing Rs 300 crore to expand its Mysuru plant, doubling the production of high-quality pressboard and laminated board. This investment is part of a larger Rs 2,000 crore plan to meet rising global demand for transformer insulation materials.
- BHEL** has entered into a licensing agreement with DRDO's Hyderabad-based Defence Metallurgical Research Lab. The company will manufacture fused silica radar domes, hence, bolstering indigenous capabilities for seeker-based missile guidance systems.
- Torrent Power** has received a Letter of Award for setting up a 1,600 MW ultra-supercritical coal-based power plant in Madhya Pradesh. This is the company's largest single investment in the power industry.
- Sterlite Technologies** announced that its US subsidiary Sterlite Technologies Inc has received a US court order to pay \$96.50 Million in a case filed by Prysmian Cables. This was on account of alleged breach of non-compete and confidentiality pacts.
- Axiscades Technologies** said that its subsidiary, Mistral Solutions, has secured a major order worth Rs 150 crore related to the Indian Air Force's Su-30MKI "Super-30" modernization program.
- Zydus Wellness's** wholly owned subsidiary Alidac UK signed a definitive agreement to acquire UK-based Comfort Click along with its subsidiaries in Ireland, US and India.

- **Ashok Leyland** has partnered with China's CALB Group to develop and manufacture next-generation batteries, investing Rs 5000 crores.
- **BEML** said it has received an order valuing more than Rs 80 crore from the from Indian Railways for supply of Utility Track Vehicles.
- **BITES** secured a letter of award worth Rs 25.30 crore from NTPC for a biennial MGR contract covering maintenance and operations at the NTPC Mouda Super Thermal Power Project.
- **NCC** announced that it has received two new water division orders totaling Rs 788.34 crore during August 2025.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

Global News

- China RatingDog General Manufacturing PMI rose to 50.5 in August 2025, above both July's levels.
- China's NBS Composite PMI Output Index increased to 50.5 in August 2025 from July's three-month low of 50.2. The manufacturing PMI inched up to 49.4 in August 2025 from July's three-month low of 49.3 while the non-Manufacturing PMI rose to 50.3 in August 2025 from July's eight-month low of 50.1.
- U.S. trade deficit in goods widened by \$18.7 billion from the previous month to \$103.6 billion in July 2025.
- US wholesale inventories rose by 0.2% month-over-month to \$908.4 billion in July 2025.
- U.S. consumer sentiment index for August was downwardly revised to 58.2 from the preliminary reading of 58.6.
- U.S. Chicago business barometer tumbled to 41.5 in August after jumping to 47.1 in July.
- U.K. seasonally adjusted S&P Global Manufacturing PMI posted 47.0 in August, down from July's six-month high of 48.0.
- Eurozone seasonally adjusted unemployment rate fell to 6.2% in July 2025, down from 6.3% in June.
- Eurozone HCOB Manufacturing PMI rose to 50.7 in August 2025, up from a flash estimate of 50.5 and July's 49.8.
- Germany's consumer price inflation rose 2.2% year-on-year in August following a 2.0% rise in each of the previous two months. Compared to the previous month, the CPI edged up 0.1% in August after a 0.3% increase in July.
- Germany's HCOB Manufacturing PMI registered 49.8 in August 2025, slightly below the flash estimate of 49.9 but up from 49.1 in July.
- France's HCOB Manufacturing PMI rose to 50.4 in August 2025, up from 48.2 in July.
- Japan S&P Global Manufacturing PMI was revised lower to 49.7 in August 2025 from a preliminary estimate of 49.9, though still above the final reading of 48.9 in July.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

Economic News

- Crude Oil traded at US\$ 64.84/bbl (IST 17:00).
- INR strengthened to Rs. 88.20 from Rs. 88.21 against each US\$ resulting in daily change of 0.01%.
- India's economic growth accelerated unexpectedly in the June quarter, gross domestic product logged an annual growth of 7.8% in the June quarter, faster than the 7.4% expansion seen in the March quarter.
- India HSBC Manufacturing PMI rose to 59.3 in August 2025 from 59.1 in July, but was revised lower from initial estimates of 59.8.
- India's power consumption experienced a 4.4% year-on-year increase in August, reaching 150.47 BU, although continuous rainfall across the country impacted demand. The peak power demand met in August reached 229.71 GW, surpassing the previous year but lower than the record high of 250 GW in May 2024.
- India collected Rs 1.86 lakh crore as goods and services tax in August, 6.5% higher than the same period last year, showed government data on Monday. For the previous month, India's gross Goods and Services Tax (GST) collection stood at Rs 1.96 lakh crore, marking a 7.5% increase compared to the same month last year.
- India's fiscal deficit widened to 29.9% of the annual target by July, driven by increased capital expenditure and a 7.5% contraction in net tax revenue. While revenue spending rose 17.1%, capital expenditure surged 32.8% to spur economic growth.

(Source: [Economic Times](#), [Business Standard](#))

Forthcoming Events

Board Meetings as on 02/09/2025

| | |
|---|-------------------|
| All Time Plastics Limited | Financial Results |
| JSW Cement Limited | Financial Results |
| Power & Instrumentation (Gujarat) Limited | Dividend |
| The Orissa Minerals Development Company Limited | Financial Results |

(Source: NSE)

Corporate Actions as on 02/09/2025

| | |
|---|------------------------------|
| Ajmera Realty & Infra India Limited | Dividend - Rs 4.50 Per Share |
| Deepak Fertilizers and Petrochemicals Corporation Limited | Dividend - Rs 10 Per Share |
| EPL Limited | Dividend - Rs 2.50 Per Share |
| Gabriel India Limited | Dividend - Rs 2.95 Per Share |
| Gujarat Narmada Valley Fertilizers and Chemicals Limited | Dividend - Rs 18 Per Share |
| Hikal Limited | Dividend - Rs 0.80 Per Share |
| ION Exchange (India) Limited | Dividend - Rs 1.50 Per Share |
| MODISON LIMITED | Dividend - Rs 2 Per Share |
| Panama Petrochem Limited | Dividend - Rs 3 Per Share |
| Radiant Cash Management Services Limited | Dividend - Rs 2.50 Per Share |
| Ratnamani Metals & Tubes Limited | Dividend - Rs 14 Per Share |
| TPL Plastech Limited | Dividend - Re 1 Per Share |
| Tribhovandas Bhimji Zaveri Limited | Dividend - Rs 2.25 Per Share |

(Source: NSE)

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