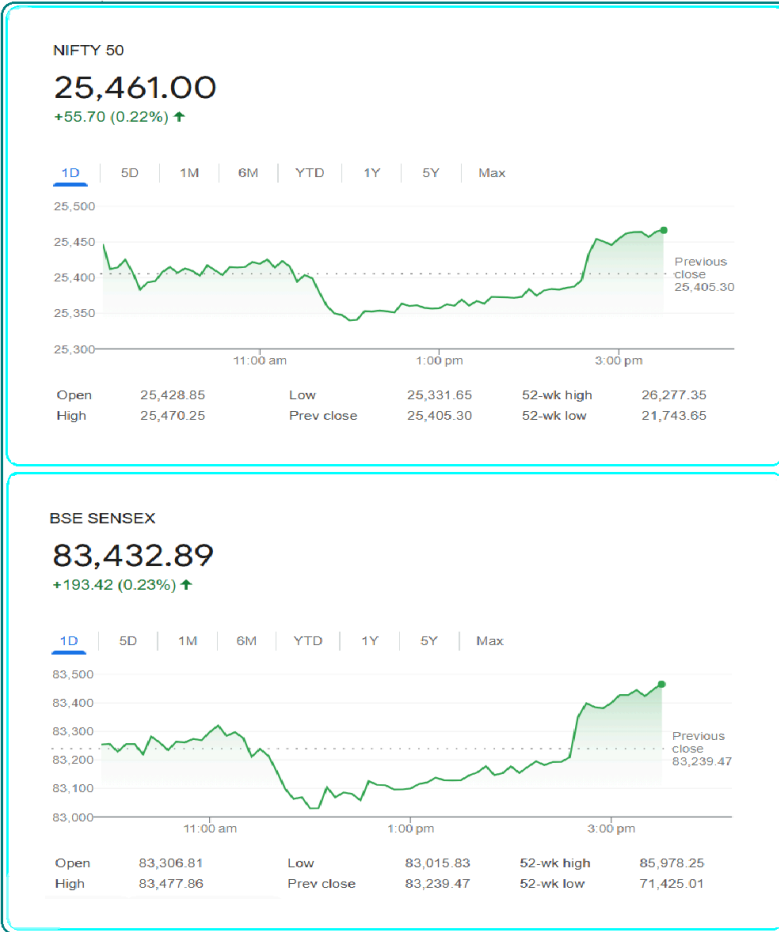


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25461.00	25405.30	0.22%
S&P BSE SENSEX	83432.89	83239.47	0.23%
NIFTY MID100	59677.75	59683.25	-0.01%
NIFTY SML100	19033.05	19027.05	0.03%

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

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57031.90	56791.95	0.42%

## Market Wrap Up

- The key domestic indices ended with moderate gains today, snapping a two-day losing streak, as investors looked ahead to the upcoming earnings season. The Nifty settled above 25,450 mark.
- The S&P BSE Sensex advanced 193.42 points or 0.23% to 83,432.89. The Nifty 50 index jumped 55.70 points or 0.22% to 25,461.
- The S&P BSE Mid-Cap index rose 0.23% and the S&P BSE Small-Cap index added 0.17%.
- Among the sectoral indices, the Nifty Oil & Gas index (up 1.05%), the Nifty Realty index (up 0.91%) and the Nifty Pharma index (up 0.81%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (down 0.45%), the Nifty Auto index (down 0.10%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **July** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **472** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **RELIANCE**, **LT**, **SBIN**, **ICICIBANK**, **HDFCBANK**.
- Short** position build up for the **July** series has been witnessed in **BHARTIARTL**, **TRENT**, **CONCOR**.
- Unwinding** position for the **July** series has been witnessed in **INFY**, **BAJFINANCE**, **BAJAJFINSV**, **CESC**.

(Source: Capitaline F&O)

<b>NIFTY AUTO</b>	23980.40	24004.95	<b>-0.10%</b>
<b>NIFTY FMCG</b>	54735.60	54515.75	<b>0.40%</b>
<b>NIFTY IT</b>	39166.55	38854.30	<b>0.80%</b>
<b>NIFTY METAL</b>	9580.40	9623.45	<b>-0.45%</b>
<b>NIFTY PHARMA</b>	22384.60	22204.25	<b>0.81%</b>
<b>NIFTY REALTY</b>	971.95	963.15	<b>0.91%</b>
<b>BSE CG</b>	72322.41	72127.75	<b>0.27%</b>
<b>BSE CD</b>	61125.16	61040.77	<b>0.14%</b>
<b>BSE Oil &amp; GAS</b>	28356.53	28003.78	<b>1.26%</b>
<b>BSE POWER</b>	6847.59	6837.05	<b>0.15%</b>

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
<b>NIKKEI225</b>	39810.88	39785.90	<b>0.06%</b>
<b>HANG SENG</b>	23916.06	24069.94	<b>-0.64%</b>
<b>STRAITS TIMES</b>	4013.62	4019.57	<b>-0.15%</b>
<b>SHANGHAI</b>	3472.32	3461.15	<b>0.32%</b>
<b>KOSPI</b>	3054.28	3116.27	<b>-1.99%</b>
<b>JAKARTA</b>	6865.19	6878.05	<b>-0.19%</b>
<b>TAIWAN</b>	22547.50	22712.97	<b>-0.73%</b>
<b>KLSE COMPOSITE</b>	1550.19	1548.99	<b>0.08%</b>
<b>ALL ORDINARIES</b>	8841.90	8833.60	<b>0.09%</b>

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
<b>NSE Cash</b>	<b>88820.82</b>	96738.82
<b>NSE F&amp;O</b>	<b>127576.10</b>	161113.31

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
<b>NET BUY</b>	-
<b>NET SELL</b>	<b>760.11</b>

(Source: [NSE](#))

## Corporate News

- HDFC Bank** said that its average deposits increased 16.4% to Rs 26,58,000 crore as on 30th June 2025 compared with Rs 22,83,100 crore as on 30th June 2024. CASA deposits increased 6.1% to Rs 8,60,400 crore as of 30th June 2025 compared with Rs 8,10,600 crore as of 30th June 2024. The bank's period end deposits were approximately Rs 27,64,000 crore as of 30th June 2025, a growth of around 16.2% over Rs 23,79,100 crore as of 30th June 2024.
- Bajaj Finance** deposits jumped 15% to approximately Rs 72,100 crore as of 30th June 2025 compared with Rs 62,774 crore as of 30th June 2024. Assets under management (AUM) grew by 25% to approximately Rs 4,41,400 crore as of 30th June 2025 compared with Rs 3,54,192 crore as of 30th June 2024. In Q1 FY26, AUM grew by approximately Rs 24,750 crore. The company's new loan books grew 23% to 13.49 million in Q1 FY26 compared with 10.97 million in Q FY25.
- Bandhan Bank's** total deposits rose by 16.1% to Rs 154,664 crore in the quarter ended 30 June 2025, compared to Rs 133,207 crore recorded in the quarter ended 30 June 2024. The bank's total deposits increased by 2.3% compared with Rs 151,212 crore reported in the quarter ended 31 March 2025. Bulk deposits stood at Rs 49,147 crore in Q1 FY26, up 19.6% YoY and up 4.4% QoQ.
- RBL Bank** reported an 11% rise in total deposits to Rs 1,12,665 crore as of 30 June 2025, as against Rs 1,01,352 crore recorded as of 30 June 2024. The Bank continues to focus on growing the share of granular retail deposits in the overall deposit mix, with deposits below Rs 3 crore constituting approximately 51.4% of the overall deposits of the Bank as of 30 June 2025. The CASA rose by 11% to Rs 36,606 crore as of 30 June 2025, compared to Rs 33,003 crore recorded as of 30 June 2024. The CASA ratio decreased to 32.5% as of 30 June 2025, compared to 32.6% reported during the same period a year ago.
- Shriram Properties** has announced the launch of its latest mid-premium residential project 'Codename: The One' in Electronic City corridor of Bengaluru. The project hosts 340 units of 2 & 3 bed residences, with aggregate saleable area of approximately 5 lakh square feet and a

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BAJFINANCE	925.30	910.15	1.66%
INFY	1640.70	1618.70	1.36%
DRREDDY	1307.40	1291.30	1.25%
ICICIBANK	1442.80	1425.90	1.19%
WIPRO	270.05	267.05	1.12%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
TRENT	5456.00	6191.00	-11.87%
TATASTEEL	163.01	165.91	-1.75%
EICHERMOT	5629.00	5716.00	-1.52%
TECHM	1655.20	1671.90	-1.00%
MARUTI	12646.00	12752.00	-0.83%

(Source: [Moneycontrol](#))

- **Reliance Industries's** retail unit Reliance Retail Ventures Ltd (RRVL) has entered into a strategic minority investment in UK-based FaceGym, a facial fitness and skincare brand. With this acquisition, RRVL marks its foray into the beauty and wellness sector.
- **Oil and Natural Gas Corporation** collaborates with Japan's Mitsui OSK Lines. They will construct two very large ethane carriers. These carriers will import petrochemical feedstock for ONGC's subsidiary. This move addresses changes in liquefied natural gas (LNG) composition from Qatar. ONGC aims to secure feedstock for its petrochemical plant. Ethane imports are planned to start by mid-2028.
- **Jindal Steel** has secured a 50-year mining lease. The lease is for the Roida-I iron ore and Manganese block in Odisha. The Odisha government issued a letter of intent. This block spans 104.84 hectares. It enhances Jindal Steel's raw material security. The block has a 3 MnTPA environmental clearance. It holds 126.05 Million Tonnes of mineral deposits.

revenue potential of over Rs 350 crore.

- **Lupin** has announced the launch of Ipratropium Bromide Nasal Solution (nasal spray) in two strengths in the United States. Ipratropium Bromide Nasal Solution is a bioequivalent to Atrovent Nasal Spray of Boehringer Ingelheim Pharmaceuticals, Inc.
- **Reliance Jio** is expected to surpass Bharti Airtel in revenue and per-user revenue growth, driven by strong FWA user additions. Jio's ARPU is projected to reach Rs. 210, while Airtel's will be higher at Rs. 249, but with slower growth. Vodafone Idea anticipates ARPU improvement and a stable user base due to enhanced 4G network coverage, while awaiting tariff hikes next year.
- **MOIL** announced a 7% year-on-year increase in output, reaching 5.02 lakh tonnes in the April-June quarter. The company achieved its highest-ever monthly production in June, with 1.68 lakh tonnes.
- **Torrent Pharmaceuticals** is set to acquire an additional 2.41% stake in J.B. Chemicals & Pharmaceuticals from a group of employees for Rs 620 crore. This deal involves purchasing 38.75 lakh equity shares at Rs 1,600 per share, following the exercise of employee stock options. This acquisition is part of Torrent Pharma's broader strategy to gain a controlling stake in J.B.
- **NBCC (India)** announced securing new work orders for an aggregate value of Rs. 65.73 Crore. The stated contract involves project management consultancy (PMC) services for several building developments such as external works at the Energy Institute in Bengaluru.
- **UCO Bank** reported a 16.58% rise in total advances to Rs 2.25 lakh crore as of 30 June 2025, as against Rs 1.93 lakh crore recorded as of 30 June 2024. On a quarter-on-quarter (QoQ) basis, the total advances grew by 2.27% in Q1 FY26 from Rs 2.20 lakh crore as of 31 March 2025.
- **Bharat Forge** said that its wholly owned subsidiary, Kalyani Strategic System (KSSL) has incorporated a company, namely, Agneyastra Energetics to create end-to-end defence energetics capability.

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

## Global News

- U.S. initial jobless claims edged down to 233,000 in the week ended June 28th, a decrease of 4,000 from the previous week's revised level of 237,000. Continuing claims were unchanged from the previous week's revised level at 1.964 million in the week ended June 21st.
- U.S. non-farm payroll employment shot up by 147,000 jobs in June after jumping by an upwardly revised 144,000 jobs in May. The unemployment rate edged down to 4.1% in June from 4.2% in May.
- U.S. trade deficit climbed to \$71.5 billion in May from a revised \$60.3 billion in April. Exports tumbled by 4.0% to \$279.0 billion, while the value of imports edged down by 0.1% to \$350.5 billion.
- U.S. S&P Global Composite PMI dipped slightly to 52.9 in June 2025 from 53.0 in May. The services PMI inched down to 52.9 in June of 2025 from 53.7 in the previous month.
- U.S. ISM said its services PMI rose to 50.8 in June from 49.9 in May.
- U.S. factory orders spiked by 8.2% in May after plunging by a revised 3.9% in April.
- Eurozone industrial producer prices fell by 0.6% month-on-month in May 2025, following a sharper 2.2% decline in April. On an annual basis, producer price inflation eased sharply to 0.3% in May, down from 0.7% in April.
- German factory orders dropped by 1.4% month-over-month in May 2025, reversing an upwardly revised 1.6% rise in the previous month.

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

## Economic News

- Crude Oil traded at US\$ 66.38/bbl (IST 17:00).
- INR weakened to Rs. 85.39 from Rs. 85.31 against each US\$ resulting in daily change of 0.09%.
- China's export restrictions on critical minerals are a wake-up call for India, highlighting the urgent need to reduce reliance on Beijing. GTRI suggests reverse-engineering imports, incentivizing domestic production, and investing in deep-tech manufacturing. India's dependence on Chinese goods, including electronics and batteries, has deepened strategic vulnerabilities, necessitating immediate action.
- Indian economy is expected to grow by 6.4-6.7% during the current financial year driven by strong domestic demand, even as geopolitical uncertainty poses downside risks.
- Moody's Ratings suggests India stands to gain from lower US tariffs compared to other Asia-Pacific nations, potentially boosting investment and its manufacturing hub ambitions. FTAs with the UK and EU could further aid this progress. However, US reshoring initiatives might limit India's gains, despite recent reciprocal tariffs imposed by the US on Indian

goods.

- The Directorate General of Trade Remedies has started an investigation. It concerns polyethylene imports from Kuwait, Malaysia, Oman, Qatar, Saudi Arabia, and the UAE. The Chemicals and Petrochemicals Association of India filed a complaint. They allege that dumped imports of Linear-Density Polyethylene are hurting the industry. The investigation will determine if dumping is occurring.

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

## Forthcoming Events

### Board Meetings as on 05/07/2025

Mufin Green Finance Limited	Fund Raising
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### Board Meetings as on 07/07/2025

Siemens Energy India Limited	Financial Results
Take Solutions Limited	Financial Results
Arihant Capital Markets Limited	Financial Results/Fund Raising

(Source: NSE)

### Corporate Actions as on 07/07/2025

Dodla Dairy Limited	Dividend - Rs 2 Per Share
Exicom Tele-Systems Limited	Rights 3:20 @ Premium Rs 133/-
Sun Pharmaceutical Industries Limited	Dividend - Rs 5.50 Per Share
Veedol Corporation Limited	Dividend - Rs 22 Per Share

(Source: NSE)

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