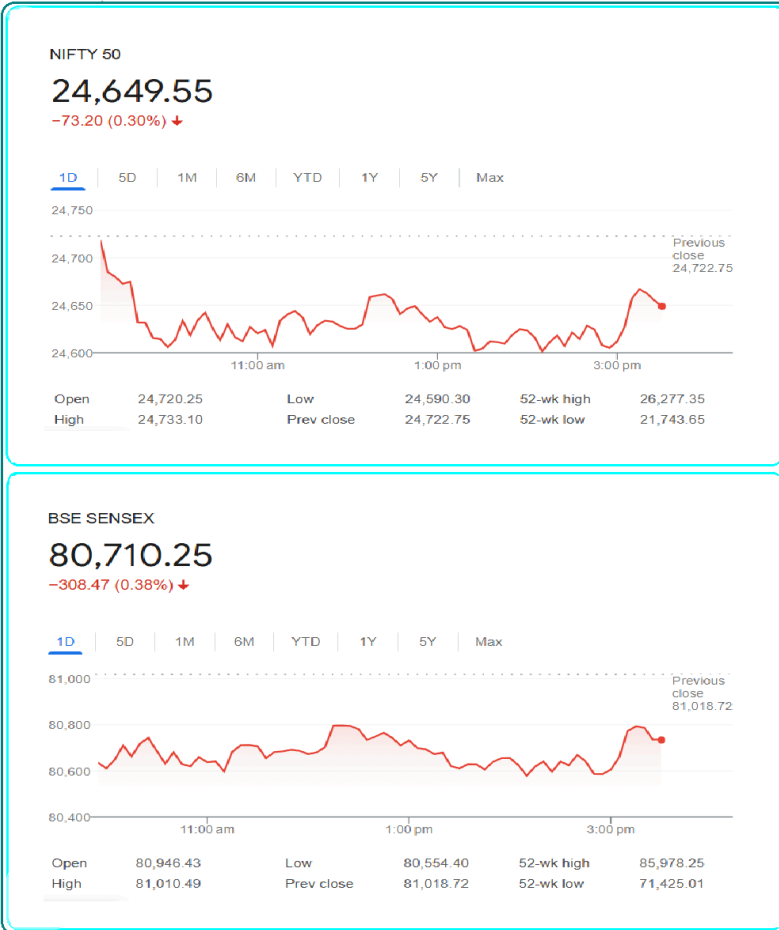


Index Chart



(Source: [Bloomberg](#))

Indian Markets

| Indices | Close | Previous | Change(%) |
|---------------------------|----------|----------|-----------|
| NIFTY 50 | 24649.55 | 24722.75 | -0.30% |
| S&P BSE SENSEX | 80710.25 | 81018.72 | -0.38% |
| NIFTY MID100 | 57206.85 | 57432.35 | -0.39% |
| NIFTY SML100 | 17864.55 | 17893.40 | -0.16% |

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

Market Wrap Up

- The domestic equity benchmarks ended with limited losses today, pressured by mixed Q1 earnings and renewed global jitters after U.S. President Donald Trump threatened steep tariffs on India. The Nifty settled a tad below the 24,650 mark.
- The S&P BSE Sensex dropped 308.47 points or 0.38% to 80,710.25. The Nifty 50 index declined 73.20 points or 0.30% to 24,649.55.
- The S&P BSE Mid-Cap index fell 0.14% and the S&P BSE Small-Cap index shed 0.27%.
- Among the sectoral indices, the Nifty Auto index (up 0.37%), the Nifty Consumer Durables index (up 0.12%) and the Nifty Metal index (up 0.09%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Oil & Gas index (down 0.96%), the Nifty Pharma index (down 0.83%) and the Nifty FMCG index down (0.72%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **August** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **4641** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **LT, ONGC, BHARTIARTL, SBIN, BAJFINANCE**.
- Short** position build up for the **August** series has been witnessed in **RELIANCE, ICICIBANK, HDFCBANK, INFY**.
- Unwinding** position for the **August** series has been witnessed in **MARUTI, VEDL, HINDUNILVR**.

(Source: Capitaline F&O)

Sectoral Indices

| Indices | Close | Previous | Change(%) |
|---------------|----------|----------|-----------|
| NIFTY BANK | 55360.25 | 55619.35 | -0.47% |
| NIFTY AUTO | 23876.30 | 23787.50 | 0.37% |
| NIFTY FMCG | 55733.70 | 56139.65 | -0.72% |
| NIFTY IT | 35034.50 | 35203.35 | -0.48% |
| NIFTY METAL | 9336.05 | 9327.85 | 0.09% |
| NIFTY PHARMA | 21970.15 | 22153.80 | -0.83% |
| NIFTY REALTY | 907.85 | 912.05 | -0.46% |
| BSE CG | 68700.82 | 68505.50 | 0.29% |
| BSE CD | 60017.11 | 59948.99 | 0.11% |
| BSE Oil & GAS | 26149.90 | 26402.56 | -0.96% |
| BSE POWER | 6695.41 | 6674.12 | 0.32% |

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

Asia Pacific Markets

| Indices | Close | Previous | Change (%) |
|----------------|----------|----------|------------|
| NIKKEI225 | 40549.54 | 40290.70 | 0.64% |
| HANG SENG | 24902.53 | 24733.45 | 0.68% |
| STRAITS TIMES | 4208.58 | 4197.23 | 0.27% |
| SHANGHAI | 3617.60 | 3583.31 | 0.96% |
| KOSPI | 3198.00 | 3147.75 | 1.60% |
| JAKARTA | 7515.19 | 7464.65 | 0.68% |
| TAIWAN | 23660.59 | 23378.94 | 1.20% |
| KLSE COMPOSITE | 1538.64 | 1526.98 | 0.76% |
| ALL ORDINARIES | 9028.80 | 8922.00 | 1.20% |

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

| Market | Current | Previous |
|----------|-----------|-----------|
| NSE Cash | 88655.41 | 83320.00 |
| NSE F&O | 118898.30 | 131974.17 |

(Source: [NSE](#))

FII Activities (Crores)

| ACTIVITIES | Cash |
|------------|-------|
| NET BUY | - |
| NET SELL | 22.48 |

(Source: [NSE](#))

Corporate News

- **Adani Ports and Special Economic Zone Ltd** reported 6% rise in consolidated net profit at Rs 3,315 crore for the quarter ended June 30, 2025, boosted by growing cargo volumes. It reported consolidated net profit of Rs 3,113 crore in the year-ago period. Revenue rose 31% to Rs 9,126 crore in Q1FY26 as against Rs 6,956 crore in Q1FY25.
- **Shree Cements** posted consolidated net sales at Rs 5,280.88 crore in June 2025 up 3.06% from Rs. 5,123.96 crore in June 2024. Net profit at Rs. 642.66 crore in June 2025 up 130.67% from Rs. 278.61 crore in June 2024.
- **Aurobindo Pharma Limited** reported a consolidated net profit of Rs. 824.20 Crore in the quarter under review, down by 10.20% on a year-on-year basis. In the previous corresponding quarter, the business posted a net profit of Rs. 918.20 Crore. The business logged revenue from operations of Rs. 7,868 Crore.
- **Alembic Pharmaceuticals'** consolidated net profit jumped 14.18% to Rs 156.63 crore in Q1 FY26, compared with Rs 134.54 crore in Q1 FY25. Revenue from operations grew 9.54% year on year (YoY) to Rs 1,710.72 crore in the quarter ended 30 June 2025.
- **Siemens Energy India** reported an 80% year-on-year rise in net profit to Rs 263 crore in Q3 June 2025. Revenue from operations grew 20% YoY to Rs 1,785 crore, supported by healthy order execution and a strong backlog.
- **Godrej Properties** posted consolidated net Sales at Rs 434.56 crore in June 2025 down 41.2% from Rs. 739.00 crore in June 2024. Net profit at Rs. 600.12 crore in June 2025 up 15.4% from Rs. 520.05 crore in June 2024.
- **Kansai Nerolac Paints** posted consolidated net sales at Rs 2,162.03 crore in June 2025 up 1.36% from Rs. 2,133.06 crore in June 2024. Net profit at Rs. 220.91 crore in June 2025 down 4.3% from Rs. 230.83 crore in June 2024.
- **UPL** posted consolidated net sales at Rs 9,216.00 crore in June 2025 up 1.64% from Rs. 9,067.00 crore in June 2024. Net loss at Rs. 88.00 crore in June 2025 up 77.08% from Rs. 384.00 crore in June 2024.

Top Gainers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|----------|----------|------------|
| INDUSINDBK | 819.15 | 804.05 | 1.88% |
| TITAN | 3418.20 | 3356.30 | 1.84% |
| MARUTI | 12537.00 | 12365.00 | 1.39% |
| SBILIFE | 1857.00 | 1831.50 | 1.39% |
| TRENT | 5317.50 | 5249.00 | 1.31% |

(Source: [Moneycontrol](#))

Top Losers

| SCRIP NAME | Close | Previous | Change (%) |
|-------------|---------|----------|------------|
| ADANI PORTS | 1358.10 | 1388.90 | -2.22% |
| ADANI ENT | 2328.20 | 2363.60 | -1.50% |
| RELIANCE | 1391.70 | 1411.50 | -1.40% |
| INFY | 1460.30 | 1480.50 | -1.36% |
| ICICIBANK | 1444.40 | 1463.20 | -1.28% |

(Source: [Moneycontrol](#))

- Torrent Electricals** said it plans to invest over Rs 1,000 crore in its newly-launched housing wire vertical over the next few years to expand manufacturing capacity and distribution network.
- Delta Corp** announced its results for the quarter ended June 2025. The business logged a 36.10% year-on-year growth in its net profit at Rs. 29.40 Crore. The company said that its revenue witnessed a modest growth at Rs. 184.70 Crore. In the previous corresponding period, it logged a revenue of Rs. 178 Crore.
- NTPC Renewable Energy Ltd** has emerged as the lowest bidder for supplying 70,000 tonnes of green ammonia under the Strategic Interventions for Green Hydrogen Transition (SIGHT) scheme, with a discovered price of Rs 51.8/kg for Krishna Phoschem Ltd at its Meghnagar facility.
- Bank of Baroda** announced the launch of bob FxOne, which is a digital foreign exchange platform designed specifically for the Bank's corporate and MSME customers.
- The **BEML** signed a Memorandum of Understanding (MoU) with TuTr Hyperloop, a deep-tech startup incubated at IIT Madras, to co-develop India's first indigenously designed Hyperloop transportation system.
- Steel Authority of India Ltd** has supplied critical-grade steel for INS Ajay and INS Nistar, cementing its support for defence indigenisation.
- RailTel Corporation of India** has received a Letter of Intent (LoI) from Bihar State Electronics Development Corporation for a project worth Rs 216.81 crore.
- LTIMindtree** announced that it secured the PAN 2.0 project by the Income Tax Department, as per the sources. The Cabinet Committee on Economic Affairs (CCEA) has recently approved the project and shall be rolled out within a period of 18 months. This project is aimed at making PAN, TAN experience simpler, faster and more citizen friendly.
- Cipla** has announced that the United States Food and Drug Administration (USFDA) has classified its recent inspection of the company's manufacturing facility in Bommasandra, Bengaluru as Voluntary Action Indicated (VAI).
- NBCC (India)** announced that it has secured a contract worth Rs 102.97 crore from Lokpal of India.

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

Global News

- China S&P General Composite PMI dipped to 50.8 in July 2025 from June's three-month high of 51.3. The services PMI rose to 52.6 in July 2025, up from June's nine-month low of 50.6.
- U.S. factory orders dove by 4.8% in June after soaring by an upwardly revised 8.3% in May.
- U.K. S&P Global Composite PMI eased to 51.5 in July 2025 from 52 in June. The services PMI was revised slightly up to 51.8 in July 2025 from a flash estimate of 51.2, though still below June's 11-month high of 52.8.
- Eurozone industrial producer prices rose 0.8% month-on-month in June 2025. On an annual basis, producer price inflation accelerated to 0.6% in June, up from 0.3% in May.
- Eurozone HCOB Composite PMI rose to 50.9 in July of 2025 from 50.6 in the previous month. The services PMI edged up to 51.0 in July 2025, rising from 50.5 in June.
- Germany's HCOB Composite PMI was revised slightly higher to 50.6 in July 2025 from a preliminary of 50.3, the highest in four months, compared to 50.4 in June. The services PMI rose to 50.6 in July 2025 from 49.7 in June and was revised up from a preliminary reading of 50.1.
- France's industrial production in France surged by 3.8% month-over-month in June 2025, rebounding from an upwardly revised 0.7% decline in May. On a yearly basis, industrial output fell 0.4% in June.
- France's HCOB Composite PMI for July 2025 was revised down to 48.6, significantly below the flash estimate of 49.6 and June's 49.2. The services PMI fell to 48.5 in July 2025 from 49.6 in June, revised down from the initial estimate of 49.7.
- Japan Jibun Bank services sector continued to expand in July, with a services PMI score of 53.6. That's up from 51.7 in June. The composite PMI came in at 51.6 in July 2025, slightly above both the flash estimate and June's reading of 51.5.

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

Economic News

- Crude Oil traded at US\$ 65.58/bbl (IST 17:00).
- INR weakened to Rs. 87.80 from Rs. 87.66 against each US\$ resulting in daily change of 0.16%.
- India HSBC composite PMI came in at 61.0 in July 2025, unchanged from the previous month. The services PMI was revised higher to 60.5 in July 2025, up from the preliminary estimate of 59.8, slightly above June's reading of 60.4.
- Indian tax authorities are investigating Jane Street for potential tax violations related to derivative trades. The probe centers on whether the firm used its Singapore entities to evade taxes, leveraging the Double Taxation Avoidance Agreement. This follows a SEBI ban alleging market manipulation.
- Deloitte India projects a 6.4-6.7% economic growth for India in FY 2025-26, fueled by strong domestic demand and

strategic global trade initiatives. While India's economic outlook remains positive, the nation must carefully monitor trade exposures and geopolitical uncertainties. Strategic trade negotiations with the UK, US, and EU are expected to boost income, jobs, and market access.

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

Forthcoming Events

Board Meetings as on 06/08/2025

| | |
|--|---------------------------------------|
| Bajaj Auto Limited | Financial Results |
| Divi's Laboratories Limited | Financial Results |
| Hero MotoCorp Limited | Financial Results |
| Pidilite Industries Limited | Financial Results/Dividend/Bonus |
| Power Finance Corporation Limited | Financial Results/Dividend |
| Bharat Forge Limited | Financial Results |
| Bharat Heavy Electricals Limited | Financial Results |
| Blue Star Limited | Financial Results |
| Godrej Agrovet Limited | Financial Results |
| Hinduja Global Solutions Limited | Financial Results |
| Trent Limited | Financial Results |
| Bajaj Holdings & Investment Limited | Financial Results |
| Balmer Lawrie & Company Limited | Financial Results |
| Bannari Amman Sugars Limited | Financial Results |
| Cera Sanitaryware Limited | Financial Results |
| Cheviot Company Limited | Financial Results |
| EID Parry India Limited | Financial Results |
| Fortis Healthcare Limited | Financial Results |
| Gopal Snacks Limited | Financial Results |
| Gujarat Narmada Valley Fertilizers and Chemicals Limited | Financial Results |
| Harsha Engineers International Limited | Financial Results |
| Hindustan Motors Limited | Financial Results/Voluntary Delisting |
| Housing & Urban Development Corporation Limited | Financial Results/Dividend |
| Indraprastha Medical Corporation Limited | Financial Results |
| Ircon International Limited | Financial Results |
| Jindal Stainless Limited | Financial Results |
| Jyoti CNC Automation Limited | Financial Results |
| K.P.R. Mill Limited | Financial Results |
| Krishna Institute of Medical Sciences Limited | Financial Results |
| Liberty Shoes Limited | Financial Results |
| Linc Limited | Financial Results |

| | |
|---|----------------------------|
| Lumax Industries Limited | Financial Results |
| Mcnally Bharat Engineering Company Limited | Financial Results |
| Monte Carlo Fashions Limited | Financial Results |
| Morepen Laboratories Limited | Financial Results |
| Peninsula Land Limited | Financial Results |
| Protean eGov Technologies Limited | Financial Results |
| PVR INOX Limited | Financial Results |
| Rain Industries Limited | Financial Results/Dividend |
| Raymond Lifestyle Limited | Financial Results |
| Raymond Limited | Financial Results |
| rites Limited | Financial Results/Dividend |
| Shipping Corporation of India Land and Assets Limited | Financial Results |
| SKF India Limited | Financial Results |
| Sula Vineyards Limited | Financial Results |
| Sundaram Clayton Limited | Financial Results |
| Sundaram Finance Holdings Limited | Financial Results |
| Tasty Bite Eatables Limited | Financial Results |
| TD Power Systems Limited | Financial Results |
| Tribhovandas Bhimji Zaveri Limited | Financial Results |
| UNO Minda Limited | Financial Results |
| VIP Industries Limited | Financial Results |
| VRL Logistics Limited | Financial Results |
| Welspun Enterprises Limited | Financial Results |

(Source: NSE)

Corporate Actions as on 06/08/2025

| | |
|--|--------------------------------------|
| Coal India Limited | Interim Dividend - Rs 5.50 Per Share |
| Blue Dart Express Limited | Dividend - Rs 25 Per Sh |
| The Anup Engineering Limited | Dividend - Rs 17 Per Share |
| The Great Eastern Shipping Company Limited | Interim Dividend - Rs 7.20 Per Share |
| Bombay Dyeing & Mfg Company Limited | Dividend - Rs 1.20 Per Share |
| Davangere Sugar Company Limited | Rights 13:25 @ Premium Rs 2.05/- |
| Dr. Lal Path Labs Ltd. | Interim Dividend - Rs 6 Per Share |
| Hester Biosciences Limited | Dividend - Rs 7 Per Share |
| Kirloskar Industries Limited | Dividend - Rs 13 Per Share |
| Rajratan Global Wire Limited | Dividend - Rs 2 Per Share |
| Ramco Industries Limited | Dividend - Re 1 Per Sh |
| The Ramco Cements Limited | Dividend - Rs 2 Per Share |

(Source: NSE)

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