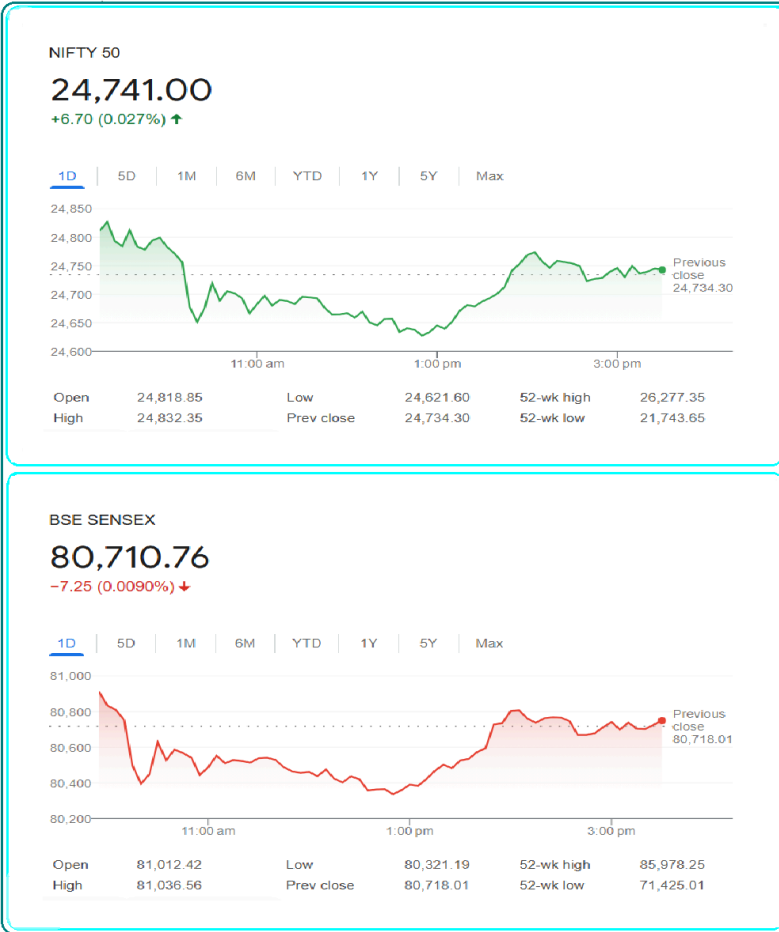


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24741.00	24734.30	0.03%
S&P BSE SENSEX	80710.76	80718.01	-0.01%
NIFTY MID100	57075.20	56959.15	0.20%
NIFTY SML100	17655.25	17621.95	0.19%

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

Market Wrap Up

- The domestic equity benchmarks ended sideways today as geopolitical concerns kept investors cautious. Despite the announcement of GST reforms, overall market sentiment remained subdued. The Nifty settled above the 24,700 level.
- The S&P BSE Sensex shed 7.25 points or 0.01% to 80,710.76. The Nifty 50 index rose 6.70 points or 0.03% to 24,741.
- The S&P BSE Mid-Cap index slipped 0.10% and the S&P BSE Small-Cap index rose 0.09%.
- Among the sectoral indices, the Nifty Auto index (up 1.25%), the Nifty Metal index (up 0.68%) and the Nifty Media index (up 0.59%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 1.44%), the Nifty FMCG index (down 1.42%) and the Nifty Realty index (down 1.16%) 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 **5778** contracts at the end of the day.
- Long** position build up for the **September** series has been witnessed in **BHARTIARTL**, **HDFCBANK**, **BAJFINANCE**.
- Short** position build up for the **September** series has been witnessed in **LT**, **SBIN**, **ICICIBANK**, **INFY**.
- Unwinding** position for the **September** series has been witnessed in **RELIANCE**, **CROMPTON**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54114.55	54075.45	0.07%
NIFTY AUTO	26320.60	25994.85	1.25%
NIFTY FMCG	56292.10	57104.05	-1.42%
NIFTY IT	34635.85	35143.10	-1.44%
NIFTY METAL	9681.65	9616.35	0.68%
NIFTY PHARMA	21924.80	21915.40	0.04%
NIFTY REALTY	872.50	882.75	-1.16%
BSE CG	66852.58	67021.45	-0.25%
BSE CD	62399.45	62340.13	0.10%
BSE Oil & GAS	25842.48	25863.00	-0.08%
BSE POWER	6541.74	6538.99	0.04%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	43018.75	42580.27	1.03%
HANG SENG	25417.98	25058.51	1.43%
STRAITS TIMES	4307.08	4296.83	0.24%
SHANGHAI	3812.51	3765.88	1.24%
KOSPI	3205.12	3200.83	0.13%
JAKARTA	CLOSED	7867.35	-
TAIWAN	24494.58	24179.85	1.30%
KLSE COMPOSITE	CLOSED	1578.15	-
ALL ORDINARIES	9140.50	9091.40	0.54%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	81938.01	105477.29
NSE F&O	144787.53	146922.65

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1304.91

(Source: [NSE](#))

Corporate News

- Tata Consultancy Services** has partnered with the government of Odisha to design and implement Integrated Financial Management System (IFMS) 3.0. Leveraging advanced cloud-native technologies, this microservices-based architecture will automate the state's comprehensive public finance workflows, representing a key advancement in Odisha's digital transformation roadmap.
- Power Grid Corporation of India** said it been declared the successful bidder to set up an inter-state transmission system for evacuating power from pumped storage projects in Sonbhadra, Uttar Pradesh, under tariff-based competitive bidding.
- Biocon** announced that the U.S. Food and Drug Administration (FDA) has completed a routine current Good Manufacturing Practice (cGMP) inspection at its biologics drug substance facility located at the Biocon Campus in Bengaluru, India.
- Glenmark Pharmaceuticals** announced the initiation of a multi-country (ex-China) Phase 3 Clinical Trial for Envafolelimab, a novel subcutaneous PD-L1 inhibitor, in patients with resectable Stage III Non-Small Cell Lung Cancer (NSCLC) in the neoadjuvant/adjuvant setting. The Company has received approval from the Drugs Controller General of India (DCGI) to begin patient enrollment and dosing in the country.
- RPP Infra Projects** has received a letter of acceptance (LoA) for an EPC order worth Rs 134.21 crore from Maharashtra State Infrastructure Development Corporation for road improvement works in Raigad district.
- Container Corporation of India** announced that it has signed a Memorandum of Understanding (MoU) with Bhavnagar Port Infrastructure (BPIPL) to operate and maintain the upcoming container terminal at the northside of Bhavnagar Port in Gujarat.
- Reliance Industries'** Oil-to-Chemicals (O2C) profitability has minimal dependence on Russian crude (2% of consolidated Ebitda) as discounts are largely negated by higher logistics and insurance costs.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
EICHERMOT	6580.50	6425.00	2.42%
M&M	3561.30	3481.50	2.29%
MARUTI	14895.00	14662.00	1.59%
POWERGRID	285.35	281.80	1.26%
DRREDDY	1268.10	1253.00	1.21%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ITC	407.35	415.90	-2.06%
HCLTECH	1419.00	1443.30	-1.68%
CIPLA	1553.40	1577.80	-1.55%
TCS	3048.30	3095.70	-1.53%
TECHM	1477.90	1500.40	-1.50%

(Source: [Moneycontrol](#))

- **Power Grid Corporation of India** said it been declared the successful bidder to set up an inter-state transmission system for evacuating power from pumped storage projects in Sonbhadra, Uttar Pradesh, under tariff-based competitive bidding.

- **NTPC** declared the permanent shutdown of its 440-MW Stage-I Tanda thermal project in Uttar Pradesh, effective September 1, 2025. This decision, approved by the competent authority and communicated to the Central Electricity Authority, reduces the NTPC group's total installed and commercial capacity to 82,926 MW. The closure involves four units, each with a capacity of 110 MW.

- **Zydus Lifesciences** will launch a generic drug for multiple sclerosis in the United States. This is through a partnership with Synthon BV. Their subsidiary, Zydus Lifesciences Global FZE, has an agreement with Synthon. Synthon will handle regulatory approval and manufacturing. Zydus will manage the commercialization in the US. The market for this drug is estimated at USD 637 million.

- **Shriram Properties** has signed a joint development agreement (JDA) for approximately 6.5 acres of prime land in North Bengaluru, with an estimated gross development value (GDV) of around Rs 500 crore.

- **PNC Infratech** announced that it has emerged as the lowest (L1) bidder for a major infrastructure project in Bihar, valued at approximately Rs 495.54 crore.

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

Global News

- U.S. initial jobless claims climbed to 237,000 in the week ended August 30th, an increase of 8,000 from the previous week's unrevised level of 229,000. Continuing claims edged down by 4,000 to 1.940 million in the week ended August 23rd.
- U.S. trade deficit shot up to \$78.3 billion in July from a revised \$59.6 billion in June. Imports surged by 5.9% to \$358.8 billion in July after plunging by 3.6% to \$338.7 billion in June while the exports rose by 0.3% to \$280.5 billion in July after slipping by 0.3% to \$279.7 billion in June.
- U.S. ADP said private sector employment rose by 54,000 jobs in August after jumping by an upwardly revised 106,000 jobs in July.
- U.S. S&P Global Composite PMI was revised down to 54.6 in August 2025, below July's seven-month high of 55.1. The services PMI fell to 54.5 in August of 2025 from the year-to-date-high of 55.7 in the previous month.

- U.S. ISM said its services PMI rose to 52.0 in August from 50.1 in July, with a reading above 50 indicating growth.
- U.K. retail sales rose by 0.6% month-on-month in July 2025, accelerating from a 0.3% increase in June. On an annual basis, retail sales were 1.1% higher in July. Core retail sales rose by 0.5% month-over-month in July 2025, following a 0.6% increase in July. Compared to the same month last year, retail sales grew by 1.3%, the same pace as in the previous month.
- Eurozone economy grew 0.1% quarter-on-quarter in Q2 2025, its weakest performance since Q4 2023, slowing from 0.6% in Q1. Year-on-year, GDP rose 1.5%, following an upwardly revised 1.6% in Q1.
- Germany's factory orders shrank 2.9% mom in July 2025, missing market forecasts of a 0.5% growth and following a downwardly revised 0.2% drop in the prior month.
- France's trade deficit narrowed to EUR 5.6 billion in August 2025 from a revised EUR 7.2 billion in July.
- France's current account deficit widened to EUR 2.5 billion in July 2025 from a downwardly revised EUR 2.3 billion in the previous month.

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

Economic News

- Crude Oil traded at US\$ 61.64/bbl (IST 17:00).
- INR weakened to Rs. 88.27 from Rs. 88.16 against each US\$ resulting in daily change of 0.12%.
- India maintained its FY 2025-26 fiscal deficit target at 4.4% of GDP, despite potential revenue losses from recent Goods and Services Tax (GST) rate reduction.
- India's diesel exports to Europe witnessed a significant surge in August, climbing 137% year-on-year to 242,000 barrels per day. This increase is attributed to European buyers preparing for the upcoming EU ban on fuels refined from Russian crude in 2026.
- The free trade agreement (FTA) between India and the four-nation European Free Trade Association (EFTA) bloc will come into effect on October 1, with legally binding provisions on trade and sustainable development for the first time. EFTA, comprising Iceland, Liechtenstein, Norway and Switzerland, signed the Trade and Economic Partnership Agreement (TEPA) with India on March 10, 2024.

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

Forthcoming Events

Board Meetings as on 08/09/2025

R M Drip and Sprinklers Systems Limited

Financial Results

(Source: NSE)

Corporate Actions as on 08/09/2025

Birla Corporation Limited

Dividend - Rs 10 Per Share

Divgi Torqtransfer Systems Limited

Dividend - Rs 2.60 Per Share

Housing & Urban Development Corporation Limited

Dividend - Re 1.05 Per Share

Isgec Heavy Engineering Limited

Dividend - Rs 5 Per Share

KDDL Limited

Dividend - Rs 5 Per Share

Taj GVK Hotels & Resorts Limited

Dividend - Rs 2 Per Share

Tega Industries Limited

Dividend - Rs 2 Per Share

(Source: NSE)

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