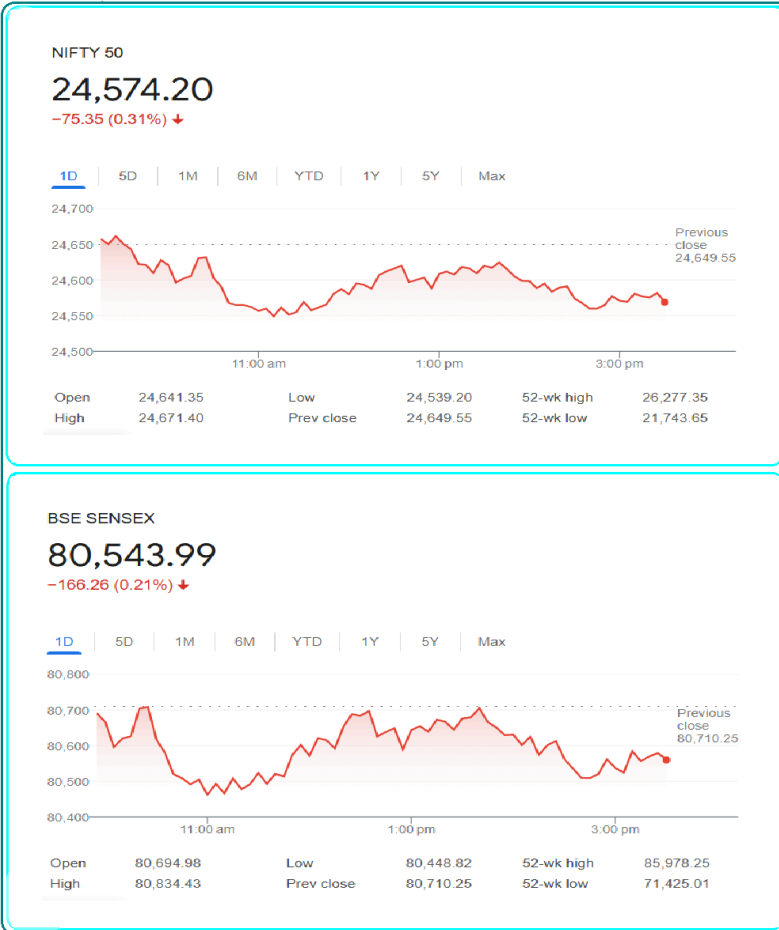


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24574.20	24649.55	-0.31%
S&P BSE SENSEX	80543.99	80710.25	-0.21%
NIFTY MID100	56749.75	57206.85	-0.80%
NIFTY SML100	17662.60	17864.55	-1.13%

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

Market Wrap Up

- The headline equity benchmarks ended with moderate losses today, extending losses for the second day in a row after the Reserve Bank of India kept the repo rate unchanged at 5.5% and maintained a neutral policy stance. The Nifty settled below the 24,600 level.
- The S&P BSE Sensex declined 166.26 points or 0.21% to 80,543.99. The Nifty 50 index fell 75.35 points or 0.31% to 24,574.20. In two consecutive trading sessions, the Sensex declined 0.59% while the Nifty shed 0.60%.
- The S&P BSE Mid-Cap index declined 1% and the S&P BSE Small-Cap index fell 1.14%.
- Among the sectoral indices, the Nifty PSU Bank index (up 0.59%), the Nifty Bank index (up 0.09%) and the Nifty Financial Services index (down 0.01%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Pharma index (down 2.03%), the Nifty healthcare index (down 1.78%) and the Nifty IT index down (1.74%) 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 **2787** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **RELIANCE, HDFCBANK, TRENT**.
- Short** position build up for the **August** series has been witnessed in **LT, BHEL, BHARTIARTL, ICICIBANK, BAJFINANCE, INFY**.
- Unwinding** position for the **August** series has been witnessed in **SBIN, TATAMOTORS, TATASTEEL**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55411.15	55360.25	0.09%
NIFTY AUTO	23748.85	23876.30	-0.53%
NIFTY FMCG	55230.80	55733.70	-0.90%
NIFTY IT	34426.25	35034.50	-1.74%
NIFTY METAL	9298.75	9336.05	-0.40%
NIFTY PHARMA	21523.75	21970.15	-2.03%
NIFTY REALTY	894.15	907.85	-1.51%
BSE CG	68131.45	68700.82	-0.83%
BSE CD	59930.12	60017.11	-0.14%
BSE Oil & GAS	26101.90	26149.90	-0.18%
BSE POWER	6654.31	6695.41	-0.61%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	40794.86	40549.54	0.60%
HANG SENG	24910.63	24902.53	0.03%
STRAITS TIMES	4227.70	4208.58	0.45%
SHANGHAI	3633.99	3617.60	0.45%
KOSPI	3198.14	3198.00	0.00%
JAKARTA	7503.75	7515.19	-0.15%
TAIWAN	23447.36	23660.59	-0.90%
KLSE COMPOSITE	1541.48	1538.64	0.18%
ALL ORDINARIES	9111.10	9028.80	0.91%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	89122.97	88655.41
NSE F&O	133584.50	118898.30

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4999.10

(Source: [NSE](#))

Corporate News

- **Bharti Airtel Ltd** reported 43% jump in consolidated net profit at Rs 5,948 crore for the quarter ended June 30, 2025. On a sequential basis, the net profit declined 46%. Revenue rose 28% year-on-year to Rs 49,463 crore in the June quarter (Q1FY26), up from Rs 38,506 crore a year earlier.
- **Bajaj Auto Ltd** reported a 14% year-on-year rise in consolidated net profit to Rs 2,210.44 crore for the fiscal first quarter of FY26. Revenue from operations climbed to Rs 13,133.35 crore in Q1 FY26, marking a 10% increase from the same quarter last year.
- **Britannia Industries Ltd** registered a 3% year-on-year (YoY) growth in its net profit for the quarter ended June 2025 at Rs. 520 Crore. In the same quarter of the previous year, the company posted a net profit of Rs. 504.9 Crore. Revenue registered a growth of 8.8% to Rs. 4,622 Crore. In the year-ago period, the business posted a revenue of Rs. 4,250.60 Crore.
- **Berger Paints India Ltd** reported 11% decline in consolidated net profit at Rs 315 crore for June quarter of 2025-26 financial year. The company had posted a net profit of Rs 354 crore for the April-June period a year ago. Revenue was up at Rs 3,200.76 crore in June quarter as against Rs 3,091.01 crore in the corresponding quarter a year ago.
- **Lupin Limited** posted net profit for the quarter jumped as much as 52.10% on a year-on-year basis. Net profit came in at Rs. 1,219 Crore. Revenue registered a growth of 11.90% to Rs. 6,268 Crore.
- **Torrent Power Limited** posted a net profit of Rs. 731 Crore. This was 24.70% y-o-y lower than Rs. 972 Crore in the previous corresponding quarter. Revenue slipped as much as 12.50% to Rs. 7,906 Crore in Q1FY26. In the same quarter of the previous year, the business logged a revenue of Rs. 9,033 Crore.
- **Divis Laboratories** posted consolidated net profit declined 17.67% to Rs 545 crore in Q1 FY26 as against Rs 662 crore recorded in Q4 FY25. Revenue from operations also declined 6.79% quarter on quarter (QoQ) to Rs 2,410 crore for the quarter ended 30 June 2025.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ASIANPAINT	2491.20	2436.80	2.23%
HDFCLIFE	752.55	738.50	1.90%
BEL	389.70	386.65	0.79%
TRENT	5356.50	5317.50	0.73%
ADANI PORTS	1367.10	1358.10	0.66%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
WIPRO	239.96	245.91	-2.42%
SUNPHARMA	1595.20	1632.10	-2.26%
INDUSINDBK	803.35	819.15	-1.93%
JIOFIN	326.55	332.85	-1.89%
TECHM	1459.00	1485.40	-1.78%

(Source: [Moneycontrol](#))

- Gland Pharma** posted consolidated net profit surged 49.88% to Rs 215.48 crore in Q1 FY26 as against Rs 143.76 crore posted in Q1 FY25. Revenue from operations increased by 7.41% YoY to Rs 1,505.62 crore for the quarter ended 30 June 2025.
- Power Finance Corporation's** consolidated net profit rose 23.86% to Rs 6,866.26 crore on a 15.46% increase in total revenue from operations to Rs 28,539.04 crore in Q1 FY26 over Q1 FY25. Total income grew by 15.73% year on year (YoY) to Rs 28,628.92 crore in the quarter ended 30 June 2025.
- PVR Inox** reported its consolidated net loss narrowed to Rs 54 crore in the quarter ended June 30, 2025. It reported consolidated net loss of Rs 179 crore in the year-ago period. Revenue rose 23% to Rs 1,469 crore in Q1FY26 as against Rs 1,191 crore in Q1FY25.
- Force Motors** has launched iPulse, a connected vehicle platform with AI-driven fleet intelligence and predictive analytics, standard across its commercial vehicles. Developed with Intangles, it offers real-time vehicle data, enhancing efficiency and reducing costs. The platform includes a command center for remote monitoring and 24/7 support, improving maintenance and decision-making.
- Emami Limited** is strategically focusing on health food, nutrition, pet care, and aloe vera-based fruit juices to drive future growth. The company aims to sharpen its portfolio within three to five years, capitalizing on the increasing consumer preference for natural and herbal products. With a strong financial position, Emami is also open to acquisitions that align with its long-term vision.
- India's power plants are currently reducing coal purchases from **Coal India**. This is happening because they are using their existing high coal reserves. Simultaneously, there's a decrease in coal-fired power generation. Increased hydropower and renewable energy sources are contributing to this shift. Coal India's production and supply have also seen a decline. Private miners are gaining market share.
- JSW Energy** has commissioned an 80 MW unit at its Kutehr Hydroelectric Power Plant. The plant's commissioned capacity now stands at 160 MW. Power dispatch to Haryana has commenced. The final 80 MW unit is expected to be commissioned soon. This project has a long-term agreement with Haryana for 240 MW.
- Bharti Airtel** has launched its own sovereign cloud service under the "Xtelify" brand to compete with hyperscalers like AWS and Google. The company says its integrated network-cloud model offers a 30-40% cost advantage.
- ITI** announced the launch of India's first AI-powered road safety pilot in Uttar Pradesh, in collaboration with US-based technology firm mLogica.
- Orchid Pharma** said that the Court of France has pronounced the order in favour of the company, to acquire the assets of Allegra Therapeutics SAS with effect from 01 August 2025.
- Adani Enterprises** has incorporated a wholly owned subsidiary, namely, Adani Cybersecurity Services (ACSL) in India, to provide end-to-end cybersecurity solutions.

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

Global News

- U.S. trade deficit shrank to \$60.2 billion in June from a revised \$71.7 billion in May. Imports, which plunged by 3.7% to \$337.5 billion in June after slipping by 0.2% to \$350.3 billion in May while the exports dipped by 0.5% to \$277.3 billion in June after tumbling by 4.1% to \$278.6 billion in May.
- U.S. S&P Global Composite PMI rose to 55.1 in July 2025, surpassing both the preliminary estimate of 54.6 and June's reading of 52.9. The services PMI rose to 55.7 in July of 2025 from 52.9 in the previous month.
- U.S. ISM said its services PMI edged down to 50.1 in July from 50.8 in June.
- Eurozone retail sales increased 0.3% month-over-month in June 2025, rebounding from a 0.3% fall in the previous month. Year-on-year, retail sales increased 3.1%, the most since September 2024, compared to a 1.9% gain in the previous month.
- Germany's factory orders dropped 1.0% mom in June 2025, missing market consensus of a 1.0% increase and following a downwardly revised 0.8% fall in May.
- France's private payroll employment stalled in the second quarter of 2025, with a decline of 4,800 jobs, bringing the total to 20.97 million.

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

Economic News

- Crude Oil traded at US\$ 66.26/bbl (IST 17:00).
- INR strengthened to Rs. 87.73 from Rs. 87.80 against each US\$ resulting in daily change of 0.08%.
- The Reserve Bank of India (RBI) maintained its key repo rate at 5.50% during its August meeting, following a larger-than-expected 50 bps in June. The RBI also held the Standing Deposit Facility (SDF) and the Marginal Standing Facility (MSF) rates steady at 5.25% and 5.75%, respectively. Previously, the central bank cut the Cash Reserve Ratio (CRR) at 4% in June, following a 50 bps cut last December. Reverse Repo Rate remained unchanged at 3.35% in July.
- The Income Tax department has been actively working to uncover tax evasion. In fiscal year 2024-25, 465 surveys led to the detection of Rs 30,444 crore in undisclosed income. Searches were conducted on 1,437 groups, resulting in the seizure of assets worth Rs 2,504 crore. These actions demonstrate the government's commitment to tackling financial irregularities.

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

Forthcoming Events

Board Meetings as on 07/08/2025

Titan Company Limited	Financial Results
Biocon Limited	Financial Results
Aegis Logistics Limited	Financial
Apollo Tyres Limited	Financial Results
Atul Auto Limited	Financial Results
AXISCADES Technologies Limited	Financial Results
Bajaj Electricals Limited	Financial Results
Ballarpur Industries Limited	Financial Results
Best Agrolife Limited	Financial Results
Birla Cable Limited	Financial Results
BIRLASOFT LIMITED	Financial Results
BSE Limited	Financial Results
C.E. Info Systems Limited	Financial Results
Caplin Point Laboratories Limited	Financial Results/Dividend
Carborundum Universal Limited	Financial Results
Century Plyboards (India) Limited	Financial Results
Crompton Greaves Consumer Electricals Limited	Financial Results
Cummins India Limited	Financial Results
Data Patterns (India) Limited	Financial Results
D-Link (India) Limited	Financial Results
Dreamfolks Services Limited	Financial Results
Dwarikesh Sugar Industries Limited	Financial Results
Edelweiss Financial Services Limited	Financial Results
Emcure Pharmaceuticals Limited	Financial Results
FDC Limited	Financial Results
General Insurance Corporation of India	Financial Results
Global Health Limited	Financial Results
Godrej Consumer Products Limited	Financial Results/Dividend
Gujarat State Fertilizers & Chemicals Limited	Financial Results
Hindustan Petroleum Corporation Limited	Financial Results
Igarashi Motors India Limited	Financial Results
Interarch Building Solutions Limited	Financial Results
IOL Chemicals and Pharmaceuticals Limited	Financial Results
Life Insurance Corporation Of India	Financial Results
Linde India Limited	Financial Results
Navneet Education Limited	Financial Results

NBCC (India) Limited	Financial Results/Dividend
Niraj Ispat Industries Limited	Financial Results
NLC India Limited	Financial Results
NOCIL Limited	Financial Results
North Eastern Carrying Corporation Limited	Financial Results
PTC India Limited	Financial Results
RepcO Home Finance Limited	Financial Results/Dividend
Solar Industries India Limited	Financial Results
Tracxn Technologies Limited	Financial Results
Tulsi Extrusions Limited	Financial Results
Varroc Engineering Limited	Financial Results
3M India Limited	Financial Results

(Source: NSE)

Corporate Actions as on 07/08/2025

Avanti Feeds Limited	Dividend - Rs 9 Per Share
Bayer Cropscience Limited	Dividend - Rs 35 Per Share
CCL Products (India) Limited	Dividend - Rs 5 Per Share
Central Depository Services (India) Limited	Dividend - Rs 12.50 Per Share
Dhunseri Investments Limited	Dividend - Rs 3 Per Share
Esab India Limited	Dividend - Rs 42 Per Share
Karur Vysya Bank Limited	Dividend - Rs 2.60 Per Share
La Opala RG Limited	Dividend - Rs 7.50 Per Share
Linde India Limited	Dividend - Rs 4.50 Per Share & Special Dividend - Rs 7.50 Per Share
Lumax Auto Technologies Limited	Dividend - Rs 5.50 Per Share
Lumax Industries Limited	Dividend - Rs 35 Per Share
Mindspace Business Parks REIT	Distribution - Rs 5.79 Per Unit Consisting Of Dividend - Rs 3.19 Per Unit/ Interest - Re 0.10 Per Unit/ Repayment Of Spv Debt - Rs 2.47 Per Unit /Other Income - Re 0.03 Per Unit
Naga Dhunseri Group Limited	Dividend - Rs 2.50 Per Share
NAVA LIMITED	Dividend - Rs 6 Per Share
PI Industries Limited	Dividend - Rs 10 Per Share
Sharda Cropchem Limited	Dividend - Rs 6 Per Share
Symphony Limited	Interim Dividend - Re 1 Per Share

(Source: NSE)

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