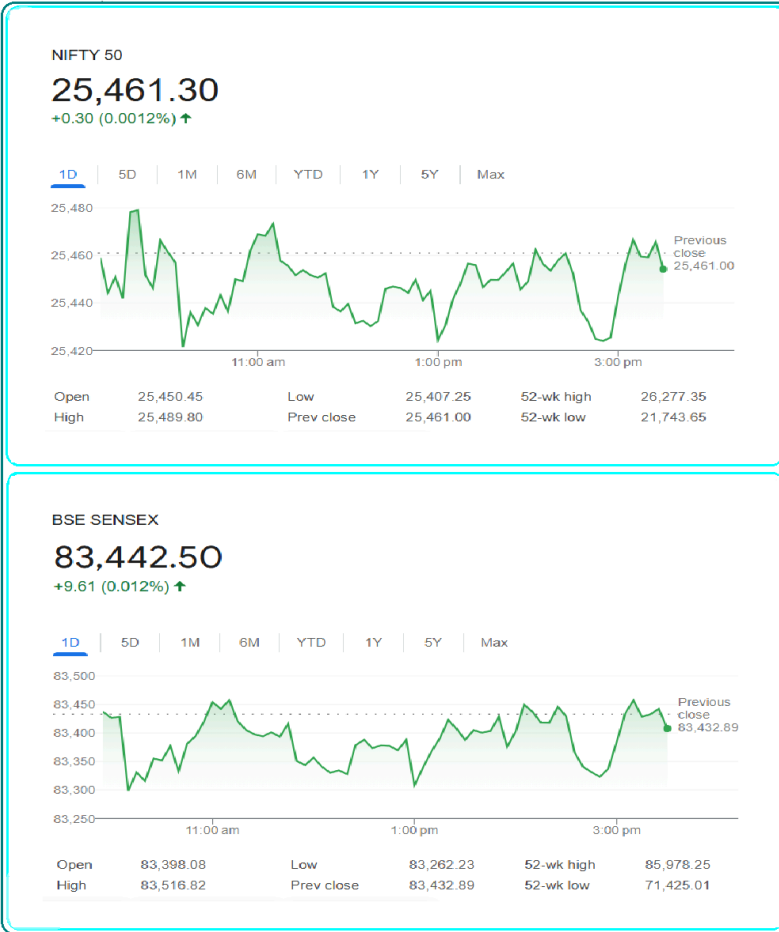


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25461.30	25461.00	0.00%
S&P BSE SENSEX	83442.50	83432.89	0.01%
NIFTY MID100	59515.75	59677.75	-0.27%
NIFTY SML100	18950.15	19033.05	-0.44%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56949.20	57031.90	-0.15%

Market Wrap Up

- The headline equity benchmarks ended a volatile session near the flat line today as investors stayed cautious amid growing uncertainty over U.S. trade policy. The Nifty settled above the 25,450 mark.
- The S&P BSE Sensex, rose 9.61 points or 0.01% to 83,442.50. The Nifty 50 index rose 0.30 points or 0.0% to 25,461.30.
- The S&P BSE Mid-Cap index shed 0.15% and the S&P BSE Small-Cap index fell 0.33%.
- On the BSE, 1,708 shares rose and 2,363 shares fell. A total of 190 shares were unchanged.
- Among the sectoral indices, the Nifty FMCG index (up 1.68%), the Nifty Oil & Gas index (up 0.41%) and the Nifty Realty index (up 0.08%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 1.03%), the Nifty IT index (down 0.76%) and the Nifty Metal index (down 0.61%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **July** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **1112** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **RELIANCE, BHARTIARTL, ITC**.
- Short** position build up for the **July** series has been witnessed in **LT, SBIN, ICICIBANK, INFY**.
- Unwinding** position for the **July** series has been witnessed in **HDFCBANK, BAJFINANCE, BAJAJFINSV**.

(Source: Capitaline F&O)

NIFTY AUTO	23943.90	23980.40	-0.15%
NIFTY FMCG	55652.85	54735.60	1.68%
NIFTY IT	38866.95	39166.55	-0.76%
NIFTY METAL	9522.15	9580.40	-0.61%
NIFTY PHARMA	22365.05	22384.60	-0.09%
NIFTY REALTY	972.75	971.95	0.08%
BSE CG	72000.88	72322.41	-0.44%
BSE CD	61047.31	61125.16	-0.13%
BSE Oil & GAS	28444.89	28356.53	0.31%
BSE POWER	6869.05	6847.59	0.31%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39587.68	39810.88	-0.56%
HANG SENG	23887.83	23916.06	-0.12%
STRAITS TIMES	4031.86	4013.62	0.45%
SHANGHAI	3473.13	3472.32	0.02%
KOSPI	3059.47	3054.28	0.17%
JAKARTA	6900.93	6865.19	0.52%
TAIWAN	22428.72	22547.50	-0.53%
KLSE COMPOSITE	1537.54	1550.19	-0.82%
ALL ORDINARIES	8826.40	8841.90	-0.18%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	76916.20	88820.82
NSE F&O	101424.77	127576.10

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	321.16
NET SELL	-

(Source: [NSE](#))

Corporate News

- IndusInd Bank Limited** posted a 3.9% decline in net advances to Rs. 3,34,477 Crore for the quarter ended June 30, 2025. In the previous corresponding quarter the business posted advances of Rs. 3,47,898 Crore. On a sequential basis, net advances slipped as much as 3.1% against Rs. 3,45,019 Crore as of 31 March 2025.
- Jubilant FoodWorks** said that the company's consolidated revenue from operations was at Rs 2,261.4 crore in Q1 FY26, marking a 17% year-on-year (YoY) jump. The company's standalone revenue from operations advanced 18.2% YoY to Rs 1,701.6 crore in Q1 FY26.
- Cochin Shipyard** said that it has signed a comprehensive Memorandum of Understanding (MoU) with HD Korea Shipbuilding & Offshore Engineering (KSOE), South Korea to establish long term co-operation across various domains of shipbuilding development.
- BEML** has secured two export orders with a combined value of approximately \$6.23 million. The first order comes from the Commonwealth of Independent States region and involves the supply of heavy-duty bulldozers. The second order, which marks BEML's maiden entry into the Uzbekistan market, is for the supply of a high-performance motor grader. These orders fall within the normal course of business
- ACME Solar Holdings** has placed a substantial order for over 3.1 GWh of Battery Energy Storage Systems (BESS) from Zhejiang Narada and Trina Energy. This significant procurement will support ACME's renewable energy projects across India, scheduled for commissioning within the next 12-18 months.
- JSW Energy** has successfully commissioned 261 MW of renewable energy, including 189 MW of solar and 72 MW of wind capacity, bringing its installed capacity to 12,760 MW. This addition boosts the share of renewables to 56% of the overall capacity.
- Kalyan Jewellers** experienced a robust 31% consolidated revenue growth in Q1 FY26, fueled by strong Akshaya Tritiya and wedding demand, despite gold price volatility. International operations mirrored this growth, while Candere's digital platform surged by 67%. The company expanded its footprint by launching 19 showrooms across

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HINDUNILVR	2410.40	2339.30	3.04%
NESTLEIND	2422.10	2392.80	1.22%
TATACONSUM	1101.90	1089.70	1.12%
EICHERMOT	5682.50	5629.00	0.95%
JIOFIN	328.05	324.95	0.95%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
BEL	417.10	427.55	-2.44%
TECHM	1623.90	1655.20	-1.89%
ONGC	241.52	245.24	-1.52%
ULTRACEMCO	12345.00	12506.00	-1.29%
ETERNAL	258.55	261.40	-1.09%

(Source: [Moneycontrol](#))

- **Info Edge (India)** reported an 11.18% year-on-year increase in standalone billings to Rs 644.2 crore for the quarter ended 30 June 2025, compared with Rs 579.4 crore recorded in the same period last year.
- **Bank of Baroda** has waived charges for customers not maintaining minimum balances in savings accounts, effective July 1, joining other major banks in this move.
- **Adani Enterprises** plans to raise Rs. 1,000 crore via non-convertible debentures. The NCDs will offer yields up to 9.30% with a 60-month tenor. Subscription opens July 9 and closes July 22. At least 75% of funds will repay debt. This is AEL's second domestic bond market fundraising. The company aims for inclusive capital markets growth and retail participation.
- **Karur Vysya Bank** has revised Marginal Cost of Funds Based Lending Rates (MCLR) of the Bank with effect from 07 July 2025 as under: Overnight MCLR - 9.25%, One month MCLR - 9.40%, Three month MCLR - 9.40%, Six month MCLR - 9.55%, One year MCLR - 9.55%.

Kalyan and Candere formats and plans to launch 170 more showrooms.

- **Tata Motors** has officially kicked off the production of its all-electric Harrier SUV at the Pune facility. This SUV stands out as Tata's most robust electric vehicle yet, boasting an optional all-wheel-drive system. Pre-orders are now live, with customer deliveries anticipated to commence in July 2025.
- **Rail Vikas Nigam Ltd.** announced that it has inked a letter of agreement (LoA) for an order worth Rs. 143.3 Crore from South Central Railway.
- **C.E. Info Systems** (MAPMYINDIA) has launched India's first ever comprehensive Digital Address System by integrating the flagship Mappls App with India Posts's DIGIPIN.
- **Tata Steel** announced that it received a demand letter from the Deputy Director of Mines, Jajpur. The letter is concerned with a revised assessment linked to a shortfall in mineral dispatches from its Sukinda chromite block.
- **Biocon** Biologics announced that the Medicines and Healthcare products Regulatory Agency (MHRA) granted marketing authorisations in the United Kingdom (UK) for Vevzuo® and Evfraxy®, biosimilars of Denosumab.
- **Hindustan Copper Ltd** plans to construct a new Rs 400-crore concentrator plant with a 3 MTPA capacity at Malanjkhanda in Madhya Pradesh. This initiative is part of HCL's broader strategy to triple its ore production capacity by 2031. The company also intends to establish another 3 MTPA concentrator plant at the Rakha mine in Jharkhand.
- **Akasa Air** has entered a three-year agreement with GMR Aero Technic for base maintenance support of its Boeing 737 MAX fleet. GMR Aero Technic will conduct scheduled maintenance checks at its Hyderabad facility, reinforcing Akasa Air's commitment to safety and reliability. This partnership highlights the growing confidence in India's MRO ecosystem and GMR Aero Technic's expertise.

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

Global News

- China's foreign exchange reserves rose by USD 32 billion to USD 3.317 trillion in June 2025, up from USD 3.285 trillion in May.
- Eurozone retail sales fell by 0.7% month-over-month in May 2025, following an upwardly revised 0.3% gain in April. On an annual basis, retail trade growth slowed to 1.8% in May from 2.7% in April.
- Eurozone Sentix investor confidence index advanced to 4.5 in July from 0.2 in June.
- Germany's industrial production rose by 1.2% month-over-month in May 2025, rebounding from a revised 1.6% decline in April. Year-on-year, production grew 1.0%, reversing a 2.1% drop in April.

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

Economic News

- Crude Oil traded at US\$ 66.93/bbl (IST 17:00).
- INR weakened to Rs. 85.86 from Rs. 85.39 against each US\$ resulting in daily change of 0.55%.
- India and the U.S. are on the verge of finalizing a mini trade deal, potentially excluding sensitive sectors like dairy and agriculture. The agreement, expected to be announced soon, will initially focus on trade in goods.
- PwC India's report reveals that Indian businesses could unlock \$9.82 trillion in economic value by 2035 by shifting to domain-led models addressing human and industrial needs. This approach encourages cross-sector collaboration and innovation across areas like manufacturing, construction, and healthcare. The report provides a framework for businesses to navigate this shift and capitalize on growth opportunities.
- The Indian Staffing Federation (ISF) has appealed to the finance ministry to lower the GST rate on employment services from 18% to 5%. ISF argues that this reduction would boost formal job creation, enhance the staffing industry's competitiveness, and align with national employment goals. They believe the change would have minimal impact on overall GST revenue.
- India's office space market is poised for robust growth in 2025, with Global Capacity Centres (GCCs) anticipated to drive significant demand, potentially absorbing 35-40% of total office space.

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

Forthcoming Events

Board Meetings as on 08/07/2025

5Paisa Capital Limited	Financial Results
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(Source: NSE)

Corporate Actions as on 08/07/2025

Titan Company Limited	Dividend - Rs 11 Per Share
Ador Welding Limited	Dividend - Rs 20 Per Share
Ingersoll Rand (India) Limited	Dividend - Rs 25 Per Share
JK Cement Limited	Dividend - Rs 15 Per Share
JSW Steel Limited	Dividend - Rs 2.80 Per Share
Plastiblends India Limited	Dividend - Rs 2.50 Per Share
Solar Industries India Limited	Dividend - Rs 10 Per Share

(Source: NSE)

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