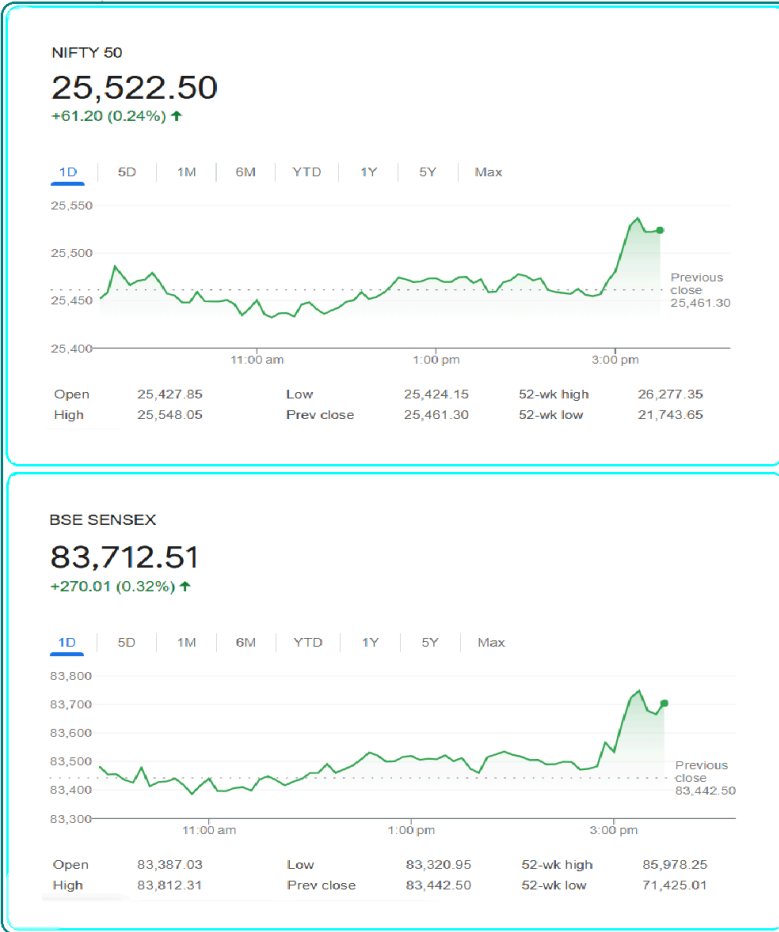


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25522.50	25461.30	0.24%
S&P BSE SENSEX	83712.51	83442.50	0.32%
NIFTY MID100	59415.45	59515.75	-0.17%
NIFTY SML100	18895.20	18950.15	-0.29%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57256.30	56949.20	0.54%

Market Wrap Up

- The headline equity benchmarks closed with moderate gains on today, supported by a late-session rally in realty, banking and financial services stocks. The upward momentum came as companies released their Q1 business updates, boosting investor sentiment. The Nifty settled above the 25,500 level.
- The S&P BSE Sensex added 270.01 points or 0.32% to 83,712.51. The Nifty 50 index rose 61.20 points or 0.24% to 25,522.50.
- The S&P BSE Mid-Cap index rose 0.01% and the S&P BSE Small-Cap index fell 0.17%.
- Among the sectoral indices, the Nifty Realty index (up 0.99%), the Nifty Private Bank index (up 0.66%) and the Nifty Financial Services index (up 0.68%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Consumer Durables index (down 2.29%), the Nifty Pharma index (down 0.89%) and the Nifty Healthcare index (down 0.89%) 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 **1749** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **RELIANCE**, **LT**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- Short** position build up for the **July** series has been witnessed in **HCLTECH**, **TITAN**, **TRENT**.
- Unwinding** position for the **July** series has been witnessed in **ONGC**, **BHARTIARTL**, **SBIN**, **BAJFINANCE**.

(Source: Capitaline F&O)

NIFTY AUTO	23852.90	23943.90	-0.38%
NIFTY FMCG	55504.00	55652.85	-0.27%
NIFTY IT	38983.25	38866.95	0.30%
NIFTY METAL	9517.40	9522.15	-0.05%
NIFTY PHARMA	22165.90	22365.05	-0.89%
NIFTY REALTY	982.35	972.75	0.99%
BSE CG	72153.56	72000.88	0.21%
BSE CD	60021.67	61047.31	-1.68%
BSE Oil & GAS	28553.07	28444.89	0.38%
BSE POWER	6916.81	6869.05	0.70%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39688.81	39587.68	0.26%
HANG SENG	24148.07	23887.83	1.09%
STRAITS TIMES	4047.86	4031.86	0.40%
SHANGHAI	3497.48	3473.13	0.70%
KOSPI	3114.95	3059.47	1.81%
JAKARTA	6904.39	6900.93	0.05%
TAIWAN	22362.27	22428.72	-0.30%
KLSE COMPOSITE	1530.14	1537.54	-0.48%
ALL ORDINARIES	8828.70	8826.40	0.03%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	91044.19	76916.20
NSE F&O	115101.16	101424.77

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	26.12

(Source: [NSE](#))

Corporate News

- Kotak Mahindra Bank's** average total deposits jumped 12.9% to Rs 4,91,998 crore as on 30th June 2025 compared with Rs 4,35,603 crore as on 30th June 2024. Average CASA stood at Rs 1,91,995 crore as on 30th June 2025, registering the growth of 4.2% compared with Rs 1,84,306 crore as on 30th June 2024. Net advances at the end-of-period (EOP) jumped 14% to Rs 4,44,731 crore in Q1 FY26, compared with Rs 3,89,957 crore in Q1 FY25. Total deposits (EOP) increased 14.6% to Rs 5,12,838 crore in Q1 FY26 compared with Rs 4,47,418 crore in Q1 FY25. CASA rose by 4.2% YoY and 2.1% QoQ to Rs. 1,91,995 crore. The bank's average total deposits went up by 5% from the previous quarter and 12.9% compared to last year, reaching Rs. 4,91,998 crore.
- Titan** posted 20% growth in the consumer business for the quarter ended June 30, 2025. During the quarter, Titan saw a net addition of 10 stores, taking the total retail network to 3,322 stores. Domestic business grew 19% YoY, led by Watches at 23% and CaratLane at 38%. The jewellery segment, including Tanishq, Mia, and Zoya, saw an 18% growth, with TMZ brands alone rising 17%.
- Tata Motors'** Jaguar Land Rover said its dispatches to dealers declined by 11% year-on-year to 87,286 units for the first quarter ended June 30. Compared to the prior year, wholesale volumes for the first quarter were down in North America, Europe and the UK by 12%, 14% and 25% respectively.
- ITC Limited's** agriculture business is strategically focused on accelerating growth through its value-added agri-products portfolio, with operations spanning 22 states and handling over 3.5 million tonnes annually. The company aims to expand across spices, coffee, frozen marine products, and processed foods, achieving a 25% revenue increase to Rs 19,753 crore.
- Adani Power** successfully acquired Vidarbha Industries Power Ltd. (VIPL) for Rs 4,000 crore, adding a 2x300 MW power plant to its portfolio. The acquisition, approved by NCLT Mumbai and implemented on July 7, 2025, increases Adani Power's operating capacity to 18,150 MW. The company aims to reach 30,670 MW by FY 2029-30, supporting India's 'Electricity for All' vision.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
KOTAKBANK	2224.50	2149.80	3.47%
ETERNAL	263.50	258.55	1.91%
ASIANPAINT	2484.60	2442.80	1.71%
NTPC	343.20	337.45	1.70%
GRASIM	2820.80	2779.10	1.50%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TITAN	3441.30	3666.10	-6.13%
DRREDDY	1283.80	1310.50	-2.04%
CIPLA	1488.30	1510.50	-1.47%
BAJAJ-AUTO	8339.50	8463.50	-1.47%
TRENT	5440.00	5499.00	-1.07%

(Source: [Moneycontrol](#))

- **M&M** reported a 20% YoY increase in production for June 2025. It has produced 83,435 units compared to 69,441 units in June last year, as per its Q1 business update. Sales for the month rose by 14% to 76,335 units, up from 66,800 units a year ago. Exports saw a slight rise of 1% to 2,634 units, compared to 2,597 units in June 2024.

- **Sun Pharma** focuses on compliance across its manufacturing units. It aims for full regulatory resolution at facilities facing USFDA action. The company has completed CAPA implementation at Halol. CAPA implementation is in process at Mohali and Dadra. R&D investment is expected to be 6-8% of sales.
- **Macrotech Developers** has achieved presales of Rs. 4,450 Crore in the first quarter of the current financial year. This is higher by 10% on a year-on-year basis.
- **NLC India** said that its board granted in-principle approval to invest upto Rs 1,630.89 crore in one or more tranches in its wholly owned subsidiary, NLC India Renewables (NIRL), through the subscription of equity shares to fund green energy projects.
- **JSW Infrastructure** has received a letter of award (LoA) from the Syama Prasad Mookerjee Port Authority for the reconstruction of berth 8 and mechanization of berths 7 and 8 at Netaji Subhas Dock, Kolkata.
- **SPML Infra** said that it has secured enhanced credit facilities worth Rs 205 crore from a major Indian public sector undertaking (PSU) bank.
- **Ceinsys Tech** received a letter of award (LoA) worth Rs 114.99 crore from the Mumbai Metropolitan Region Development Authority (MMRDA).

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

Global News

- Germany's trade surplus widened to EUR 18.4 billion in May 2025, up from an upwardly revised EUR 15.7 billion in April. Exports fell by 1.4% month-over-month to a four-month low of EUR 129.4 billion while imports shrank by 3.8% to a five-month low of EUR 111.1 billion, reversing a downwardly revised 2.2% increase in April.
- France's trade deficit widened slightly to EUR 7.8 billion in May 2025, compared to a downwardly revised EUR 7.7 billion in April. Exports dropped by 0.3% month-over-month to EUR 48.9 billion while imports fell at a slightly slower pace of 0.2% to EUR 56.7 billion.
- The Reserve Bank of Australia held its cash rate steady at 3.85% during its July meeting.
- Japan's current account surplus rose to JPY 3,436.4 billion in May 2025 from JPY 2,949.5 billion a year earlier.

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

Economic News

- Crude Oil traded at US\$ 67.77/bbl (IST 17:00).
- INR strengthened to Rs. 85.70 from Rs. 85.86 against each US\$ resulting in daily change of 0.19%.
- India's electric vehicle market experienced a significant surge in June 2025, with overall sales climbing by 28.60%, according to FADA. Electric passenger vehicle sales, as per FADA data, stood at 13,178 units in the previous month compared to 7,323 e-PVs in June 2024, registering a sharp increase of 79.95% year-on-year. The e-passenger vehicles' share in the overall electric vehicle market shot up to 4.4% in June 2025 from 2.5% in June 2024. Electric three-wheeler volumes during the month under review were recorded at 60,559 units, up 15.79% from 52,302 units in the same month last year. The e-three-wheeler segment rose to 60.2% in the total EVs demand in June 2025 against 55.4% in the period a year earlier. Electric two-wheeler retail sales during June 25 surged 31.69% at 105,355 units as against 80,003 e-two-wheelers retailed in June 2024. Electric commercial vehicle retail sales for the period under review was seen at 1,146 units as compared to 515 units in June 2024, a growth of 122.5% year-on-year.
- India's highway toll collection soared by 19.6% to Rs. 20,681.87 crore in Q1 FY26, driven by a low base from the previous year, increased toll charges, and the addition of new toll roads. The number of toll users also rose significantly, indicating increased road usage and economic activity. Sustained growth could push annual toll collection beyond Rs. 80,000 crore.
- India's fuel consumption saw a dip in June. It decreased by 4.7% compared to May. Total consumption reached 20.31 million metric tons. Gasoline sales also experienced a decline. Diesel consumption showed a slight increase. Overall fuel demand was up compared to last year. Seasonal factors and potential supply disruptions influenced the market.
- Gold loan securitization surged to 11% of India's total securitization volume in the June quarter, reaching Rs. 5,390 crore, driven by eased regulations for a major lender. Overall securitization volumes rose 9% year-on-year, totaling Rs. 49,000 crore. Vehicle loan securitization remained steady at 41%, while mortgage-backed and microfinance loan securitizations

declined to 21% and 11%, respectively, amid cautious lending approaches.

- India is planning to mandate the purchase of green-rated steel in central government projects and centrally-sponsored schemes starting from FY28. The steel ministry has drafted a cabinet note proposing minimum procurement percentages for 3-star, 4-star, and 5-star rated steel, aiming to drive demand for green steel in public procurement and promote sustainability in the sector.

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

Forthcoming Events

Board Meetings as on 09/07/2025

Burnpur Cement Limited	Financial Results
R Systems International Limited	Fund Raising
Supreme Infrastructure India Limited	Financial Results

(Source: NSE)

Corporate Actions as on 09/07/2025

Pfizer Limited	Dividend - Rs 35 Per Share & Total Special Dividend Of Rs 130 Per Share
Johnson Controls - Hitachi Air Conditioning India Limited	Interim Dividend - Rs 36 Per Share
SML Isuzu Limited	Dividend - Rs 18 Per Share
Sundaram Finance Limited	Dividend - Rs 21 Per Share
Kabra Extrusion Technik Limited	Dividend - Rs 2.50 Per Share
MphasiS Limited	Dividend - Rs 57 Per Share
S.J.S. Enterprises Limited	Dividend - Rs 2.50 Per Share

(Source: NSE)

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