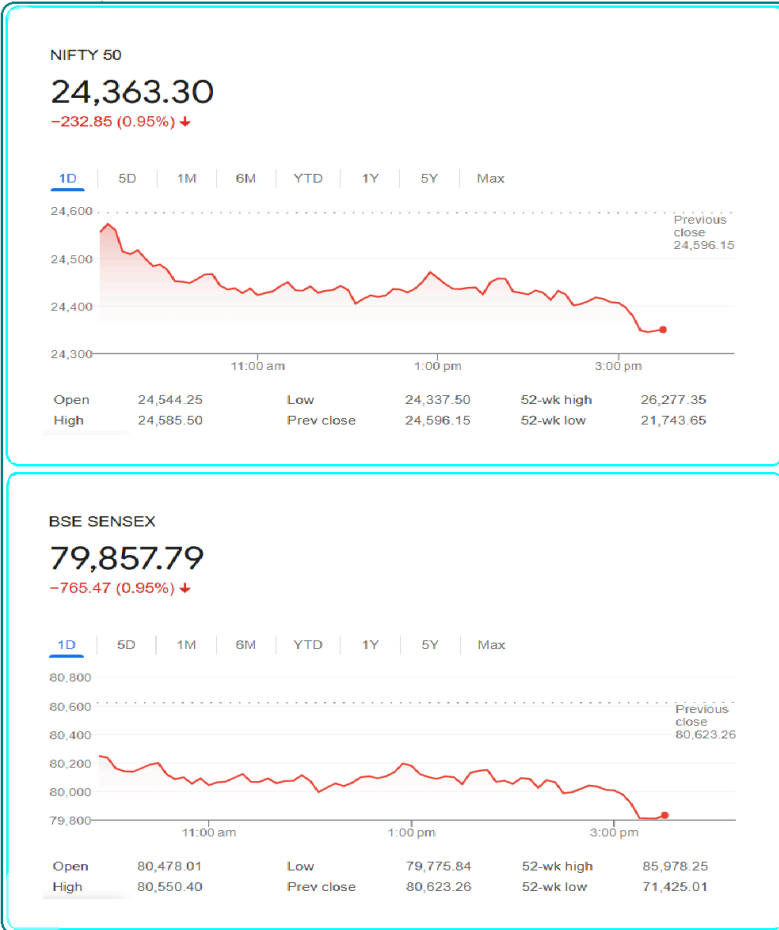


Index Chart



(Source: [Bloomberg](#))

Indian Markets

| Indices | Close | Previous | Change(%) |
|---------------------------|----------|----------|---------------|
| NIFTY 50 | 24363.30 | 24596.15 | -0.95% |
| S&P BSE SENSEX | 79857.79 | 80623.26 | -0.95% |
| NIFTY MID100 | 56002.20 | 56938.30 | -1.64% |
| NIFTY SML100 | 17428.20 | 17692.65 | -1.49% |

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

Market Wrap Up

- The headline equity benchmarks ended with significant losses today as investors remained cautious amid concerns over the impact of Trump's tariff decision. Market sentiment turned risk-averse, with participants adopting a risk-off approach. Going forward, investors will closely monitor crude oil prices, FII activity and development on the tariff front. The Nifty settled below 24,400 level.
- The S&P BSE Sensex tanked 765.47 points or 0.95% to 79,857.79. The Nifty 50 index declined 232.85 points or 0.95% to 24,363.30.
- The S&P BSE Mid-Cap index fell 1.56% and the S&P BSE Small-Cap index tanked 1.03%.
- Among the sectoral indices, the Nifty Oil & Gas index (down 0.07%), the Nifty Media index (down 0.10%) and the Nifty PSU Bank index (down 0.41%) outperformed the Nifty 50 index. Meanwhile, the Nifty Realty index (down 2.11%), the Nifty Consumer Durables index (down 1.91%) and the Nifty Metal index (down 1.76%) 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 **6560** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **GAIL, HINDPETRO, NTPC**.
- Short** position build up for the **August** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, BAJFINANCE, INFY**.
- Unwinding** position for the **August** series has been witnessed in **TITAN, HEROMOTOCO**.

(Source: Capitaline F&O)

Sectoral Indices

| Indices | Close | Previous | Change(%) |
|---------------|----------|----------|-----------|
| NIFTY BANK | 55004.90 | 55521.15 | -0.93% |
| NIFTY AUTO | 23474.65 | 23808.10 | -1.40% |
| NIFTY FMCG | 54900.95 | 55298.50 | -0.72% |
| NIFTY IT | 34398.50 | 34726.80 | -0.95% |
| NIFTY METAL | 9147.10 | 9310.65 | -1.76% |
| NIFTY PHARMA | 21402.15 | 21684.80 | -1.30% |
| NIFTY REALTY | 874.15 | 893.00 | -2.11% |
| BSE CG | 66751.26 | 67848.76 | -1.62% |
| BSE CD | 59029.25 | 60039.82 | -1.68% |
| BSE Oil & GAS | 26029.19 | 26057.06 | -0.11% |
| BSE POWER | 6573.23 | 6630.06 | -0.86% |

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

Asia Pacific Markets

| Indices | Close | Previous | Change (%) |
|----------------|----------|----------|------------|
| NIKKEI225 | 41820.48 | 41059.15 | 1.85% |
| HANG SENG | 24858.82 | 25081.63 | -0.89% |
| STRAITS TIMES | 4239.83 | 4258.15 | -0.43% |
| SHANGHAI | 3635.13 | 3639.67 | -0.12% |
| KOSPI | 3210.01 | 3227.68 | -0.55% |
| JAKARTA | 7533.38 | 7490.18 | 0.58% |
| TAIWAN | 24021.26 | 24003.77 | 0.07% |
| KLSE COMPOSITE | 1556.98 | 1549.11 | 0.51% |
| ALL ORDINARIES | 9076.60 | 9102.00 | -0.28% |

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

| Market | Current | Previous |
|----------|-----------|-----------|
| NSE Cash | 100444.68 | 98041.49 |
| NSE F&O | 142270.55 | 178838.11 |

(Source: [NSE](#))

FII Activities (Crores)

| ACTIVITIES | Cash |
|------------|---------|
| NET BUY | 1932.81 |
| NET SELL | - |

(Source: [NSE](#))

Corporate News

- **State Bank of India** posted a consolidated net profit of Rs 19,160 crore for Q1 FY26, up 12.48% from Q1 FY25 and 2.78% higher sequentially. Net interest income came in at Rs 41,072 crore, marginally lower by 0.13% YoY and down 3.98% QoQ.
- **Titan Company Ltd** reported 34% increase in standalone net profit at Rs 1,030 crore for the quarter ended June 30, 2025. The firm reported standalone net profit of Rs 770 crore in the year-ago period. Revenue rose 21% to Rs 14,564 crore in Q1FY26 as against Rs 12,053 crore a year ago.
- **Hindustan Petroleum Corporation** posted standalone net profit stood at Rs 4,370.87 crore in Q1 FY26, registering a 1,128.46% year-on-year (YoY) increase from Rs 355.80 crore in the same quarter last year. Net sales declined 2.72% YoY to Rs 1,10,212.61 crore during the June 2025 quarter.
- **Grasim Industries** posted consolidated net profit rose 31.97% to Rs 1418.68 crore in the quarter ended June 2025 as against Rs 1075.03 crore during the previous quarter ended June 2024. Sales rose 15.92% to Rs 40118.08 crore in the quarter ended June 2025 as against Rs 34609.75 crore during the previous quarter ended June 2024.
- **JK Tyre & Industries** posted consolidated net profit declined 21.80% to Rs 165.35 crore in the quarter ended June 2025 as against Rs 211.44 crore during the previous quarter ended June 2024. Sales rose 6.32% to Rs 3868.94 crore in the quarter ended June 2025 as against Rs 3639.08 crore during the previous quarter ended June 2024.
- **Apollo Tyres** reported a 95.73% drop in consolidated net profit to Rs 12.88 crore in Q1 FY26 as against Rs 302 crore posted in Q1 FY25. Revenue grew by 3.56% YoY to Rs 6,560.76 crore in the quarter ended 30 June 2025.
- **Cummins India** reported a 40.36% surge in standalone net profit to Rs 589.27 crore in Q1 FY26, compared to Rs 419.80 crore posted in Q1 FY25. Revenue from operations jumped 26.37% to Rs 2,858.71 crore in the quarter ended 30 June 2025.

Top Gainers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|---------|----------|------------|
| NTPC | 334.75 | 329.75 | 1.52% |
| TITAN | 3460.20 | 3415.70 | 1.30% |
| DRREDDY | 1211.40 | 1200.80 | 0.88% |
| HDFCLIFE | 761.55 | 755.70 | 0.77% |
| BAJAJFINSV | 1919.20 | 1914.00 | 0.27% |

(Source: [Moneycontrol](#))

Top Losers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|---------|----------|------------|
| BHARTIARTL | 1858.60 | 1922.60 | -3.33% |
| ADANIENT | 2178.10 | 2249.80 | -3.19% |
| INDUSINDBK | 782.45 | 807.35 | -3.08% |
| SHRIRAMFIN | 609.65 | 627.35 | -2.82% |
| M&M | 3144.20 | 3211.10 | -2.08% |

(Source: [Moneycontrol](#))

- Life Insurance Corporation of India** reported a standalone net profit of Rs 10,987 crore for Q1 FY26. This marks a rise of 5% on-year from the Rs 10,461 crore net profit reported in Q1 FY25. Net premium income also rose 5% year-on-year to Rs 1.19 lakh crore during the April-June quarter of financial year 2026.
- Biocon** reported a 95.2% decline in consolidated net profit to Rs 31.40 crore despite of 15.8% jump in Net sales to Rs 3,910.10 crore in Q1 FY26 over Q1 FY25.
- Info Edge (India)** posted consolidated rose 27.06% to Rs 295.92 crore in the quarter ended June 2025 as against Rs 232.90 crore during the previous quarter ended June 2024. Sales rose 16.87% to Rs 790.86 crore in the quarter ended June 2025 as against Rs 676.71 crore during the previous quarter ended June 2024.
- Page Industries'** standalone net profit jumped 21.52% to Rs 200.79 crore on a 3.05% increase in revenue from operations to Rs 1,316.56 crore in Q1 FY26 over Q1 FY25.
- Bajaj Electricals** reported a sharp 96.76% drop in consolidated net profit to Rs 0.91 crore in Q1 FY26, compared to Rs 28.11 crore in Q1 FY25. Revenue from operations declined 8.07% year-on-year (YoY) to Rs 1,059.23 crore for the quarter ended 30 June 2025.
- NLC India's** consolidated net profit jumped 42.57% to Rs 797.59 crore on a 13.24% increase in revenue from operations to Rs 3,825.61 crore in Q1 FY26 over Q1 FY25.
- BSE Ltd** reported 9% increase in net profit at Rs 539 crore for the quarter ended June 30, 2025. It reported net profit of Rs 494 crore in the previous quarter. Revenue rose 13% to Rs 958 crore in Q1FY26 as compared to Rs 847 crore a quarter ago.
- Reliance Industries anticipates potential disruptions to trade due to ongoing geopolitical issues. Tariff uncertainties may affect the demand-supply balance. These tensions are causing volatility in global markets. Crude oil prices are expected to remain unstable. This is due to sanctions and output decisions by OPEC. Global oil demand will likely grow despite the rise of electric vehicles.
- Reliance Infrastructure** is set to recover Rs. 214.13 billion in unpaid dues from its Delhi power distribution companies, following a Supreme Court ruling. These dues, resulting from past tariff shortfalls, will be recovered from consumers over four years starting April 2024, potentially increasing electricity tariffs. The Supreme Court has directed regulators to clear deferred costs owed to power distribution companies.
- Jio Star** India's provisions for expected losses on sports contracts have surged. The company set aside Rs 25,760 crore for 2024-25. This increase reflects pressure from long-term sports rights deals. Despite this, Jio Star reported a modest profit of Rs 18 crore. Revenue edged up, driven by advertising and subscriptions.
- Indian Oil Corporation** and **Bharat Petroleum Corporation** have purchased a significant amount of non-Russian crude oil. The state refiners acquired at least 22 million barrels for delivery in September and October. This move follows pressure from the United States to reduce reliance on Russian oil. The purchases include crude from the U.S., Brazil, Libya, Middle East, Canada, Nigeria and Angola.

- **GAIL** and **Hindustan Copper Limited** have partnered through a Memorandum of Understanding to explore and develop critical mineral resources both in India and abroad. This collaboration aims to enhance India's self-reliance in vital minerals, crucial for clean energy and technology sectors. The partnership combines GAIL's energy infrastructure expertise with HCL's mineral exploration strengths.
- **Marksans Pharma** said that its subsidiary, Marksans Pharma Inc, has received final approval from the U.S. Food and Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) for Omeprazole Delayed-Release Tablets, 20 mg (OTC).
(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

Global News

- U.S. initial jobless claims climbed to 226,000 in the week ended August 2nd, an increase of 7,000 from the previous week's revised level of 219,000. Continuing claims rose by 38,000 to 1.974 million in the week ended July 26th.
- U.S. total consumer credit rose by \$7.37 billion in June 2025, accelerating from a \$5.1 billion gain in May.
- U.S. wholesale inventories inched up by 0.1 percent in June after falling by 0.3 percent in May.
- French unemployment rate was unchanged at 7.5% in Q2 2025. The number of unemployed rose by 29 thousand to 2.4 million.
- Japan posted a current account surplus of 1.348 trillion yen in June, down from 3.436 trillion yen in the previous month.

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

Economic News

- Crude Oil traded at US\$ 64.19/bbl (IST 17:00).
- INR strengthened to Rs. 87.66 from Rs. 87.70 against each US\$ resulting in daily change of 0.05%.
- India's Atmanirbhar Bharat faces headwinds as the US imposes a 50% tariff on Indian exports due to continued Russian oil purchases. Moody's warns this could hinder manufacturing growth, particularly in electronics, and slow GDP by 0.3% in FY26. While Russian oil helps contain inflation, balancing it with tariff burdens poses economic challenges.

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

Forthcoming Events

Board Meetings as on 09/08/2025

| | |
|------------------------------|-------------------|
| Happy Forgings Limited | Financial Results |
| HBL Engineering Limited | Financial Results |
| HLV LIMITED | Financial Results |
| IFGL Refractories Limited | Financial Results |
| Olectra Greentech Limited | Financial Results |
| Suprajit Engineering Limited | Financial Results |
| The Andhra Sugars Limited | Financial Results |

Board Meetings as on 11/08/2025

| | |
|---|--------------------------------|
| BEML Limited | Financial Results |
| Bajaj Consumer Care Limited | Financial Results |
| Ashoka Buildcon Limited | Financial Results/Fund Raising |
| Bata India Limited | Financial Results |
| Astral Limited | Financial Results |
| Aban Offshore Limited | Financial Results |
| Allcargo Terminals Limited | Financial Results |
| Apex Frozen Foods Limited | Financial Results |
| ARSS Infrastructure Projects Limited | Financial Results |
| Atlas Cycles (Haryana) Limited | Financial Results |
| Awfis Space Solutions Limited | Financial Results |
| Bannari Amman Spinning Mills Limited | Financial Results |
| Belrise Industries Limited | Financial Results |
| Bharat Wire Ropes Limited | Financial Results |
| Brigade Hotel Ventures Limited | Financial Results |
| Capacit'e Infraprojects Limited | Financial Results |
| Cello World Limited | Financial Results |
| Dollar Industries Limited | Financial Results |
| Emkay Global Financial Services Limited | Financial Results |
| Esab India Limited | Financial Results |
| Eureka Forbes Limited | Financial Results |
| Federal-Mogul Goetze (India) Limited. | Financial Results |
| IPCA Laboratories Limited | Financial Results |
| JM Financial Limited | Financial Results |
| KNR Constructions Limited | Financial Results |
| Kronox Lab Sciences Limited | Financial Results |

| | |
|--|-------------------|
| Krsnaa Diagnostics Limited | Financial Results |
| Lakshmi Finance & Industrial Corporation Limited | Financial Results |
| Man Industries (India) Limited | Financial Results |
| Muthoot Microfin Limited | Financial Results |
| Shalimar Paints Limited | Financial Results |
| SJVN Limited | Financial Results |
| Som Distilleries & Breweries Limited | Financial Results |
| Subex Limited | Financial Results |
| Texmaco Infrastructure & Holdings Limited | Financial Results |
| Tilaknagar Industries Limited | Financial Results |
| TITAGARH RAIL SYSTEMS LIMITED | Financial Results |
| Trigyn Technologies Limited | Financial Results |
| V.S.T Tillers Tractors Limited | Financial Results |
| Websol Energy System Limited | Financial Results |
| West Coast Paper Mills Limited | Financial Results |

(Source: NSE)

Corporate Actions as on 11/08/2025

| | |
|---|--------------------------------------|
| Akzo Nobel India Limited | Special Dividend - Rs 156 Per Share |
| Castrol India Limited | Interim Dividend - Rs 3.50 Per Share |
| Globus Spirits Limited | Dividend - Rs 2.76 Per Share |
| GPT Infraprojects Limited | Interim Dividend - Re 1 Per Share |
| Indo Count Industries Limited | Dividend - Rs 2 Per Share |
| Jio Financial Services Limited | Dividend - Re 0.50 Per Share |
| Kalyani Steels Limited | Dividend - Rs 10 Per Sh |
| KPI Green Energy Limited | Interim Dividend - Re 0.20 Per Share |
| Rashi Peripherals Limited | Dividend - Rs 2 Per Share |
| Tainwala Chemical and Plastic (I) Limited | Interim Dividend - Rs 3 Per Share |

(Source: NSE)

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