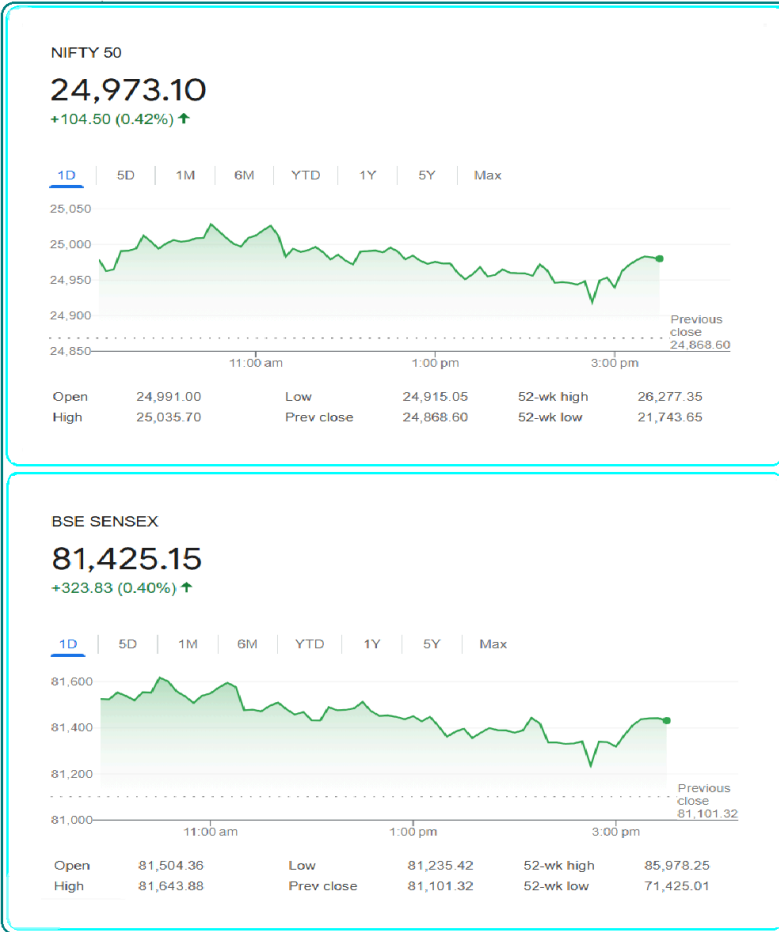


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24973.10	24868.60	0.42%
S&P BSE SENSEX	81425.15	81101.32	0.40%
NIFTY MID100	57999.55	57464.35	0.93%
NIFTY SML100	17874.60	17744.30	0.73%

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

Market Wrap Up

- The key equity benchmarks ended with decent gains today, supported by positive global cues. Sentiment remained upbeat on hopes of easing India-U.S. diplomatic tensions and possible rate cuts by the U.S. Federal Reserve next week. Investors will also keep an eye on upcoming IPOs. The Nifty settled above the 24,950 mark.
- The S&P BSE Sensex added 323.83 points or 0.40% to 81,425.15. The Nifty 50 index rose 104.50 points or 0.42% to 24,973.10.
- The S&P BSE Mid-Cap index rose 0.84% and the S&P BSE Small-Cap index advanced 0.72%.
- Among the sectoral indices, the Nifty IT index (up 2.63%), the Nifty PSU Bank index (up 2.09%) and the Nifty Realty index (up 1.13%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Auto index (down 1.28%), the Nifty Media index (down 0.64%) and the Nifty Consumer Durables index (down 0.30%) 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 **9507** contracts at the end of the day.
- Long** position build up for the **September** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- Short** position build up for the **September** series has been witnessed in **ETERNAL**, **CROMPTON**, **TRENT**.
- Unwinding** position for the **September** series has been witnessed in **BHEL**, **PNB**, **TITAN**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54536.00	54216.10	0.59%
NIFTY AUTO	26833.95	27182.50	-1.28%
NIFTY FMCG	56856.85	56497.25	0.64%
NIFTY IT	36183.80	35255.90	2.63%
NIFTY METAL	9759.45	9734.20	0.26%
NIFTY PHARMA	22122.05	22052.65	0.31%
NIFTY REALTY	883.80	873.95	1.13%
BSE CG	68366.25	67104.56	1.88%
BSE CD	61786.71	61919.86	-0.22%
BSE Oil & GAS	25933.57	25834.78	0.38%
BSE POWER	6591.15	6547.56	0.67%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	43837.67	43459.29	0.87%
HANG SENG	26200.26	25938.13	1.01%
STRAITS TIMES	4346.46	4297.57	1.14%
SHANGHAI	3812.22	3807.29	0.13%
KOSPI	3314.53	3260.05	1.67%
JAKARTA	7699.01	7628.60	0.92%
TAIWAN	25192.59	24855.18	1.36%
KLSE COMPOSITE	1590.75	1586.81	0.25%
ALL ORDINARIES	9095.20	9080.70	0.16%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	102041.40	79908.68
NSE F&O	135208.09	121057.19

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	2050.46
NET SELL	-

(Source: [NSE](#))

Corporate News

- Hero MotoCorp** has announced a price reduction of up to Rs 15,743 on its two-wheelers, effective September 22. This move aims to pass on the full benefit of the GST rate cut to customers across models like Splendor+, Xoom, and others. The company believes this will boost consumption and make two-wheelers more affordable, especially ahead of the festive season.
- Bajaj Auto** announced that it will fully pass on the GST reduction to customers. With this, it will offer up to Rs. 20,000 off on two-wheelers and KTM bikes. Additionally, three-wheelers will benefit about Rs. 24,000 from this. The new changes shall be effective from September 22, 2025.
- Royal Enfield** has announced price reductions of up to Rs 22,000 on its popular 350cc motorcycles, including the Classic, Bullet, Meteor, and Hunter 350, effective September 22, 2025. This move follows recent GST reforms and aims to make the brand more accessible to first-time buyers. The price adjustments will also extend to service, apparel, accessories, and models above 350cc.
- Sterling and Wilson Renewable Energy** has secured a Rs 415 crore order to develop a 300 MW AC/420 MWp DC solar power project in Rajasthan. The project includes a 220/33 kV pooling substation. This order boosts the company's gross order inflows to over Rs 2,400 crore this year, highlighting its strong execution capabilities.
- Vedanta** is actively acquiring land in Dhenkanal, Odisha, to establish a new 3 MTPA aluminium smelter, aiming to double its total capacity to 6 MTPA. This significant investment, expected to generate over two lakh jobs, is progressing well and anticipated to take three to four years to complete.
- MTAR Technologies Ltd** has secured new international orders worth \$43.87 million (Rs. 386.06 Crore) in the clean energy segment.
- Glenmark Pharma** announced that its wholly owned subsidiary, Ichnos Glenmark Innovation (IGI) has secured an upfront payment of \$700 million from NYSE-listed AbbVie. This payment is made for a molecule used in cancer treatment.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BEL	388.00	371.95	4.32%
WIPRO	255.71	249.15	2.63%
HCLTECH	1463.90	1427.10	2.58%
HDFCLIFE	777.00	761.10	2.09%
BAJFINANCE	967.95	948.40	2.06%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
M&M	3602.00	3696.30	-2.55%
MARUTI	15108.00	15365.00	-1.67%
BAJAJ-AUTO	9254.50	9383.00	-1.37%
HEROMOTOCO	5350.50	5423.50	-1.35%
ULTRACEMCO	12444.00	12572.00	-1.02%

(Source: [Moneycontrol](#))

- **Sun Pharma** announced that USFDA has classified the company's plant as "Official Action Indicated" (OAI). Hence, the facility has been kept under import alert with continuous restriction on shipments.
- **Samvardhana Motherson** announced that it has acquired the balance 25% stake in two Turkish subsidiaries. Therefore, it will take full ownership as part of its global expansion plans.
- **Rajesh Power Services** secured a Rs 143.11 crore turnkey contract from Dakshin Gujarat Vij Company (DGVCL) to convert the 11/22 kV HT network to underground cables in Valsad and Surat rural areas.
- **Kellton Tech Solutions** announced the signing of a memorandum of understanding (MoU) with Hungary-based E-Group ICT Software Zrt to collaborate on an AI Project under the EU-India Framework Agreement.

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

Global News

- China's consumer prices dropped 0.4% in August from a year ago after remaining flat in July. On a monthly basis, CPI was flat, following a 0.4% increase in July.
- China's producer prices fell 2.9% yoy in August 2025, slowing from a 3.6% drop in the previous month. Monthly, the PPI was flat, after a 0.2% fall in the preceding month.

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

Economic News

- Crude Oil traded at US\$ 63.22/bbl (IST 17:00).
- INR strengthened to Rs. 88.11 from Rs. 88.12 against each US\$ resulting in daily change of 0.01%.
- Fitch Ratings anticipates global growth deceleration, yet India is projected to maintain a growth rate above 6% for the next three years. While the global growth forecast for 2025 has been slightly raised, driven by China and the Eurozone, the US economy is showing signs of a slowdown.

- NCEL and APEDA have partnered to boost India's cooperative-led agricultural exports. The MoU, signed in the presence of government officials, aims to enhance value realization for farmers and strengthen India's global market position. This collaboration will focus on capacity building, quality compliance, infrastructure support, and market intelligence to drive export readiness across the cooperative sector.
- The Union Cabinet has sanctioned Rs 7,616 crore for infrastructure projects, including a four-lane highway between Mokama and Munger and the doubling of the Bhagalpur-Dumka-Rampurhat railway line. These initiatives aim to improve connectivity, reduce congestion, and boost economic activity across Bihar, Jharkhand, and West Bengal, generating employment and facilitating freight movement.
- Indian shrimp exporters face a projected 12% revenue decline in FY26 due to steep US tariffs, impacting their competitiveness against rivals like Ecuador. This tariff, effective August 27, significantly erodes India's cost advantage, compressing margins by 150 bps and increasing working capital stress. Diversification efforts into other markets offer limited price realization, necessitating strategic adaptations for financial stability.
- The Indian government is developing a Rs. 38,900 crore carbon capture, utilization, and storage (CCUS) program, with plans to contribute over half of the total investment. The initiative aims to support industries like iron, chemicals, and green hydrogen, while also addressing emissions from coal-based power plants.

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

Forthcoming Events

Board Meetings as on 11/09/2025

Infosys Limited	Buyback
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(Source: NSE)

Corporate Actions as on 11/09/2025

Century Plyboards (India) Limited	Dividend - Re 1 Per Share
Datamatics Global Services Limited	Dividend - Rs 5 Per Share
Edelweiss Financial Services Limited	Dividend - Rs 1.50 Per Share
Ircon International Limited	Dividend - Re 1 Per Share
Patanjali Foods Limited	Bonus 2:1
Pondy Oxides & Chemicals Limited	Dividend - Rs 3.50 Per Share
Somany Ceramics Limited	Dividend - Rs 3 Per Share
Subros Limited	Dividend - Rs 2.60 Per Share
Tamil Nadu Newsprint & Papers Limited	Dividend - Rs 3 Per Share
TV Today Network Limited	Dividend - Rs 3 Per Share

(Source: NSE)

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