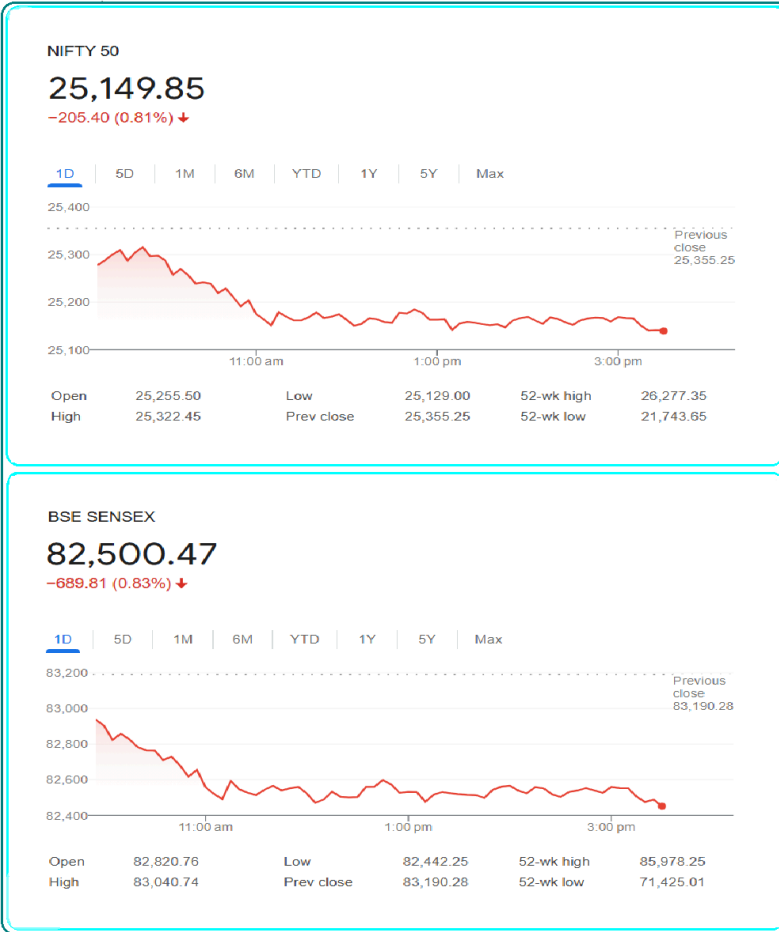


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25149.85	25355.25	-0.81%
S&P BSE SENSEX	82500.47	83190.28	-0.83%
NIFTY MID100	58642.20	59159.95	-0.88%
NIFTY SML100	18763.45	18956.25	-1.02%

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

Market Wrap Up

- The key equity indices ended with major losses today, declining for the third day in a row, amid global uncertainty and disappointing earnings from key companies. The Nifty settled a tad below the 25,150 mark.
- The S&P BSE Sensex tumbled 689.81 points or 0.83% to 82,500.47. The Nifty 50 index dropped 205.40 points or 0.81% to 25,149.85. In three consecutive trading sessions, the Sensex declined 1.45%, while the Nifty fell 1.46%.
- The S&P BSE Mid-Cap index shed 0.65% and the S&P BSE Small-Cap index rose 0.70%.
- Among the sectoral indices, the Nifty Pharma index (up 0.68%), the Nifty FMCG index (up 0.51%) and the Nifty Healthcare index (up 0.07%) outperformed the Nifty 50 index.
- Meanwhile, the IT index (down 1.78%), the Nifty Auto index (down 1.77%) and the Media index (down 1.60%) the underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **July** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **7286** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **SBIN, HINDUNILVR**.
- Short** position build up for the **July** series has been witnessed in **RELIANCE, LT, BHARTIARTL, ICICIBANK, HDFCBANK, INFY**.
- Unwinding** position for the **July** series has been witnessed in **ITC, VEDL, TRENT**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56754.70	56956.00	-0.35%
NIFTY AUTO	23493.80	23916.85	-1.77%
NIFTY FMCG	55910.25	55628.20	0.51%
NIFTY IT	37693.25	38376.65	-1.78%
NIFTY METAL	9382.85	9423.55	-0.43%
NIFTY PHARMA	22225.90	22076.80	0.68%
NIFTY REALTY	962.90	974.70	-1.21%
BSE CG	70967.04	71835.52	-1.21%
BSE CD	59491.08	60037.13	-0.91%
BSE Oil & GAS	27802.96	28162.91	-1.28%
BSE POWER	6890.22	6920.03	-0.43%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39569.68	39646.36	-0.19%
HANG SENG	24139.57	24028.37	0.46%
STRAITS TIMES	4087.81	4075.70	0.30%
SHANGHAI	3510.18	3509.68	0.01%
KOSPI	3175.77	3183.23	-0.23%
JAKARTA	7047.44	7005.37	0.60%
TAIWAN	22751.03	22693.25	0.25%
KLSE COMPOSITE	1536.07	1536.52	-0.03%
ALL ORDINARIES	8820.30	8826.70	-0.07%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	97900.73	86650.23
NSE F&O	140285.65	138103.05

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	5104.22

(Source: [NSE](#))

Corporate News

- **Tata Consultancy Services** posted consolidated net sales at Rs 63,437.00 crore in June 2025 up 1.32% from Rs. 62,613.00 crore in June 2024. Net profit at Rs. 12,760.00 crore in June 2025 up 5.98% from Rs. 12,040.00 crore in June 2024.
- **Glenmark Pharmaceuticals** has entered into a significant agreement with AbbVie to commercialize its investigational drug, ISB 2001, targeting cancer and autoimmune diseases. The deal, potentially worth up to USD 2 billion, grants AbbVie exclusive rights in major markets, while Glenmark will focus on emerging markets.
- **Tata Elxsi** posted net sales at Rs 892.10 crore in June 2025 down 3.71% from Rs. 926.46 crore in June 2024. Net profit at Rs. 144.37 crore in June 2025 down 21.57% from Rs. 184.08 crore in June 2024.
- Priya Nair to be CEO and MD of **Hindustan Unilever Limited**. Rohit Jawa will step down as CEO and MD on July 31, 2025. CFO Ritesh Tiwari likely to step down, shift to a global role.
- **Anand Rathi Wealth** reported a 27.8% jump in consolidated net profit to Rs 93.62 crore on 15.8% increase in total income to Rs 284.26 crore in Q1 FY26 over Q1 FY25. In Q1 FY25, revenue from mutual fund distribution increased 27% YoY to Rs 113 crore. Share of equity mutual funds in AUM remains flat to 54% as of June 2025 over June 2024.
- **Indian Renewable Energy Development Agency** posted a 36% y-o-y decline in its Q1FY26 standalone net profit at Rs. 247 Crore. In the same quarter, year-ago the business logged a net profit of Rs. 384 Crore. The company's interest income registered a growth of 29% to Rs. 1,909 Crore versus Rs. 1,483 Crore in the previous corresponding period.
- **Gland Pharma** announced that the Pashamylaram facility of the Company has received certificate of Good Manufacturing Practices (GMP) Compliance from Danish Medicines Agency in connection with Marketing authorizations listing manufacturers located outside of the European Economic Area, for aseptically prepared Powder for injection, infusion and inhalation.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INDUSINDBK	852.85	840.75	1.44%
MARUTI	12650.00	12470.00	1.44%
TATASTEEL	160.66	159.00	1.04%
BAJFINANCE	947.65	940.60	0.75%
BAJAJFINSV	2039.40	2026.40	0.64%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
BHARTIARTL	1964.50	2019.70	-2.73%
ASIANPAINT	2451.20	2498.90	-1.91%
HDFCLIFE	771.25	786.30	-1.91%
APOLLOHOSP	7359.00	7469.00	-1.47%
SHRIRAMFIN	671.75	681.05	-1.37%

(Source: [Moneycontrol](#))

- Wockhardt** is undertaking significant strategic realignment of its US business in line with its long-term vision to build a differentiated, innovation-driven pharmaceutical enterprise. As part of this transition, the Company has taken decision to exit the US generic pharmaceutical segment, paving the way for deeper focus and investment in its advanced product portfolio.
- Deepak Fertilisers & Petrochemicals Corporation**, along with its step-down subsidiary Performance Chemiserve (PCL), has entered into a long-term regasification agreement with Petronet LNG (PLL), India's leading LNG infrastructure company.
- GTPL Hathway** posted consolidated net sales at Rs 903.70 crore in June 2025 up 7.15% from Rs. 843.37 crore in June 2024. Net profit at Rs. 10.56 crore in June 2025 down 26.11% from Rs. 14.29 crore in June 2024.
- Bharat Petroleum Corporation Ltd** will shut its Bina refinery's crude unit, which has a capacity of 156,000 barrels per day, for 15 days starting August 11 for maintenance. This shutdown will affect diesel production. However, gasoline production will continue through the secondary unit. The refinery is also scheduled for a 30-day shutdown in 2027 for capacity expansion.
- RPP Infra Projects** announced that RPP-BCC JV has bagged an order worth Rs 365.85 crore from Public Health Engineering Department (PHED), Ajmer, Rajasthan.
- SPML Infra** secured an Rs 385 crore contract under the Government of India's Jal Jeevan Mission.
- Lloyds Enterprises** announced that its subsidiary, Lloyds Realty Developers (LRDL), had signed a non-binding memorandum of understanding (MoU) with Calculus Logistech (CLPL) and its existing shareholders.
- Tata Motors, M&M, Bajaj Auto, Ola Electric, and TVS Motor** are expected to claim over Rs. 2,000 crore under the PLI scheme for achieving investment and sales targets in FY25. Bajaj Auto leads with a projected claim of Rs. 630 crore. The government emphasizes supporting applicants and ensuring domestic value addition to boost the auto sector's competitiveness.
- Tata Elxsi** announced the signing of a Memorandum of Understanding (MoU) with Synopsys, a leader in silicon to systems design solutions, to collaborate to deliver advanced automotive virtualization solutions.
- Aegis Logistics** said it has executed a business transfer agreement (BTA) with its associate company, Aegis Vopak Terminals (AVTL), for the transfer of its newly commissioned LPG cryogenic terminal at Pipavav.

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

Global News

- U.S. initial jobless claims dipped to 227,000 in the week ended July 5th, a decrease of 5,000 from the previous week's revised level of 232,000. Continuing claims rose by 10,000 to 1.965 million in the week ended June 28th.
- U.K. economy contracted 0.1% month-over-month in May 2025, following a 0.3% fall in April. Considering the three months to May, the GDP grew 0.5%.
- U.K. trade deficit narrowed to GBP 5.70 billion in May 2025, down from a downwardly revised GBP 6.50 billion in April.
- U.K. industrial production fell by 0.9% month-on-month in May 2025 from a 0.6% drop in the previous month. On an annual basis, industrial production fell by 0.3% in May 2025, reversing an upwardly revised 0.3% rise.
- U.K. manufacturing production in the UK dropped by 1% month-over-month in May 2025, downwardly revised 0.7% decrease in the previous month. On a yearly basis, manufacturing output rose by 0.3% in May, slowing from an upwardly revised 1.3% gain in the preceding period.
- German wholesale prices rose by 0.9% year-on-year in June 2025, accelerating sharply from a 0.4% gain in the previous month. On a monthly basis, wholesale prices increased 0.2%, reversing a 0.3% fall in May.
- French annual inflation rate rose to 1% in June 2025, revised up from an initial estimate of 0.9% and higher than May's 0.7%. On a monthly basis, consumer prices rose 0.4%, rebounding from a 0.1% decline in the prior period.

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

Economic News

- Crude Oil traded at US\$ 67.16/bbl (IST 17:00).
- INR weakened to Rs. 85.79 from Rs. 85.64 against each US\$ resulting in daily change of 0.18%.
- The United States has expressed concerns at the World Trade Organization regarding India's dairy certificate requirements. America views them as unnecessary trade barriers. These requirements mandate confirmation that imported milk products are free from harmful substances. Washington insists such measures should be science-based. This issue arises amidst ongoing trade negotiations between the two nations.
- India has adjusted its plan for retaliatory tariffs on the US due to increased duties on steel and aluminium. The WTO received India's request to modify tariffs on American goods. This action follows the US raising tariffs to 50 percent. India's move aims to collect equivalent duties from US products.
- Capital expenditure by major central public sector enterprises and key government bodies surged by 25% in June, reaching Rs. 62,425 crore, offering vital support to the Indian economy amid sluggish private investment. In the first quarter, these entities spent Rs. 1.67 lakh crore, a 15% increase year-on-year, with railways and NHAI leading the way.
- The Indian government has allocated Rs 1,345 crore to boost domestic production of rare earth magnets, as announced

by Heavy Industries Minister HD Kumaraswamy. This initiative follows China's imposition of export restrictions on rare earth elements and magnets in April.

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

Forthcoming Events

Board Meetings as on 12/07/2025

Amber Enterprises India Limited	Fund Raising
Neogen Chemicals Limited	Fund Raising

Board Meetings as on 14/07/2025

HCL Technologies Limited	Financial Results/Dividend
Rallis India Limited	Financial Results
Tata Technologies Limited	Financial Results
Authum Investment & Infrastructure Ltd	Financial Results
Brigade Enterprises Limited	Fund Raising
Den Networks Limited	Financial Results
H.G. Infra Engineering Limited	Fund Raising
Kesoram Industries Limited	Financial Results
NELCO Limited	Financial Results
Ola Electric Mobility Limited	Financial Results
Satin Creditcare Network Limited	Fund Raising
Sirca Paints India Limited	Fund Raising
Tejas Networks Limited	Financial Results

(Source: NSE)

Corporate Actions as on 14/07/2025

Craftsman Automation Limited	Dividend - Rs 5 Per Share
Persistent Systems Limited	Dividend - Rs 15 Per Share
R R Kabel Limited	Dividend - Rs 3.50 Per Share
Wendt (India) Limited	Dividend - Rs 20 Per Share

(Source: NSE)

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