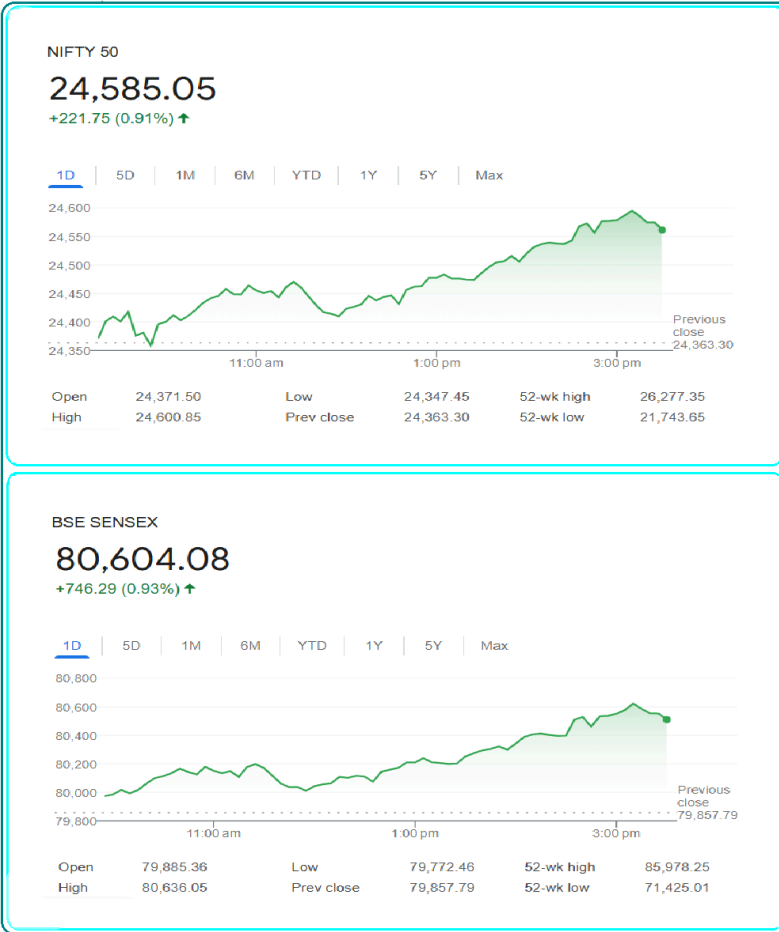


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24585.05	24363.30	0.91%
S&P BSE SENSEX	80604.08	79857.79	0.93%
NIFTY MID100	56479.00	56002.20	0.85%
NIFTY SML100	17491.70	17428.20	0.36%

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

Market Wrap Up

- The key benchmark indices ended with major gains today as investors engaged in bargain buying. Market participants will closely track crude oil prices and FII activity while awaiting key economic data releases, including WPI, CPI, and trade balance, scheduled for later this week. The Nifty closed above the 24,550 mark.
- The S&P BSE Sensex surged 746.29 points or 0.93% to 80,604.08. The Nifty 50 index jumped 221.75 points or 0.91% to 24,585.05.
- The S&P BSE Mid-Cap index added 0.79% and the S&P BSE Small-Cap index rose 0.35%.
- Among the sectoral indices, the Nifty PSU Bank services index (up 2.20%), the Nifty Realty index (up 1.86%) and the Nifty Healthcare index (up 1.17%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (up 0.16%), the Nifty IT index (up 0.42%) and the Nifty Metal index (up 0.52%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **August** series futures witnessed an unwinding of **short** position. Open Interest has been decreased by **1685** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **RELIANCE, LT, INFY, DELHIVERY**.
- Short** position build up for the **August** series has been witnessed in **ICICIBANK, BAJFINANCE, BIOCON**.
- Unwinding** position for the **August** series has been witnessed in **BHEL, BHARTIARTL, SBIN, HDFCBANK**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55510.75	55004.90	0.92%
NIFTY AUTO	23723.75	23474.65	1.06%
NIFTY FMCG	55309.90	54900.95	0.74%
NIFTY IT	34544.65	34398.50	0.42%
NIFTY METAL	9194.80	9147.10	0.52%
NIFTY PHARMA	21604.65	21402.15	0.95%
NIFTY REALTY	890.40	874.15	1.86%
BSE CG	66966.61	66751.26	0.32%
BSE CD	58760.13	59029.25	-0.46%
BSE Oil & GAS	26184.74	26029.19	0.60%
BSE POWER	6628.93	6573.23	0.85%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	CLOSED	41820.48	-
HANG SENG	24906.81	24858.82	0.19%
STRAITS TIMES	4232.78	4239.83	-0.17%
SHANGHAI	3647.55	3635.13	0.34%
KOSPI	3206.77	3210.01	-0.10%
JAKARTA	7605.92	7533.38	0.96%
TAIWAN	24135.50	24021.26	0.48%
KLSE COMPOSITE	1563.24	1556.98	0.40%
ALL ORDINARIES	9117.60	9076.60	0.45%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	81193.79	100444.68
NSE F&O	127733.65	142270.55

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1202.65

(Source: [NSE](#))

Corporate News

- Tata Motors** reported a net profit of Rs 3,924 crore for the April-June quarter of the financial year 2026. This marks a 30% on-year drop from the Rs 5,643 crore net profit from continuing operations reported in the same period last year. Revenue dropped 2.5% on-year to Rs 1.04 lakh crore in Q1 FY26, from Rs 1.07 lakh crore in Q1 FY25.
- Hindustan Construction Company** posted consolidated net profit at Rs 50.73 crore in the quarter ended June 2025 as against net loss of Rs 2.46 crore during the previous quarter ended June 2024. Sales declined 39.90% to Rs 1091.33 crore in the quarter ended June 2025 as against Rs 1815.95 crore during the previous quarter ended June 2024.
- Voltas** posted consolidated net profit tanked 57.97% to Rs 140.46 crore in Q1 FY26, compared with Rs 334.23 crore in Q1 FY25. Total income slipped 19.60% year on year to Rs 4,020.65 in the first quarter of FY26.
- DOMS Industries** posted consolidated net profit increased 10.5% to Rs 57.28 crore on a 26.4% rise in revenue from operations to Rs 562.28 crore in Q1 FY26 over Q1 FY25.
- Ipca Laboratories** reported 21.31% increase in consolidated net profit of Rs 233.31 crore in Q1 FY26 as against Rs 192.24 crore posted in Q1 FY25. Revenue from operations jumped 10.33% year on year to Rs 2,308.85 crore in the quarter ended 30 June 2025.
- Power Mech Projects** reported a 30.5% surge in consolidated net profit to Rs 80.55 crore, while revenue from operations rose 28.4% to Rs 1,293.41 crore in Q1 FY26 over Q1 FY25.
- Siemens** has reported 3.1% decline in consolidated net profit to Rs 422.90 crore despite a 15.5% rise in revenue from operations to Rs 4,346.80 crore in Q3 FY 2025 as compared with Q3 FY 2024.
- Sun TV Network** posted net sales at Rs 1,256.79 crore in June 2025 down 1.51% from Rs. 1,276.11 crore in June 2024. Net profit at Rs. 528.66 crore in June 2025 down 3.34% from Rs. 546.94 crore in June 2024.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ADANIENT	2283.40	2178.10	4.83%
TATAMOTORS	653.75	633.70	3.16%
ETERNAL	309.40	300.90	2.82%
GRASIM	2758.90	2691.60	2.50%
APOLLOHOSP	7259.00	7084.50	2.46%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
HEROMOTOCO	4562.20	4599.80	-0.82%
BEL	383.90	384.60	-0.18%
BHARTIARTL	1857.40	1858.60	-0.06%

(Source: [Moneycontrol](#))

- **Larsen & Toubro** has been awarded a significant contract by Adani Power Ltd to establish eight thermal power units. These units will contribute a substantial 6,400 MW of new generation capacity. Adani Power entrusted L&T Energy - CarbonLite Solutions (LTECLS) with this project, involving the construction of eight 800 MW thermal units.
- **Zyudus Lifesciences** has secured USFDA approval to market Diltiazem Hydrochloride tablets, used for treating angina and high blood pressure, in strengths of 30 mg, 60 mg, 90 mg, and 120 mg. The medication, a calcium-channel blocker, relaxes blood vessels, easing the heart's workload and improving blood flow.
- **Dr. Reddy's Laboratories** announced that it has received an Establishment Inspection Report (EIR) from the United States Food and Drug Administration (USFDA) for its API manufacturing facility (CTO-5) located in Miryalaguda, Telangana.
- **Lupin** announced the launch of Glucagon for Injection USP, 1 mg/vial, packaged in an emergency kit, in the United States.
- **Shilpa Medicare** has announced the receipt of approval of its, Nor Ursodeoxycholic Acid (NorUDCA) Tablets 500 mg, by the Central Drugs Standard Control Organization (CDSCO), marking a major milestone in innovative NAFLD therapy in India.

- **Axiscades** reported a 24% year-on-year rise in consolidated net profit to Rs 21 crore in the June quarter of FY26. Axiscades had logged a net profit of Rs 17 crore in the April-June period of the preceding 2024-25, the company said in a statement. In the first quarter, the company reported a growth of over 9% in its income to Rs 254.30 crore, from Rs 233.77 crore a year ago.
- **ONGC** plans to invest over Rs 4,600 crore in Andhra Pradesh's Konaseema District for oil and gas development, including drilling wells and establishing processing facilities. The project requires environmental clearance, with the EAC requesting a biodiversity assessment and restoration plan. This initiative is expected to create direct and indirect employment opportunities.
- **Mahindra Logistics Ltd** has introduced Alyte, a premium, tech-driven B2C mobility service, starting in Delhi NCR. Expanding to major cities and airports, Alyte offers airport-to-city, in-city, and outstation travel. Hemant Sikka, MD and CEO, emphasizes Alyte's focus on reimagining urban mobility with assured rides and transparent pricing.
- **Shipping Corporation of India** is planning a big purchase. It will buy twenty-six ships made in India. This is part of a government plan. The goal is to boost India's shipbuilding industry. Other sectors like petroleum and steel will also buy ships. The total value of these orders is very high.
- **Maruti Suzuki India** commemorates NEXA's 10th anniversary with the launch of the Grand Vitara 'Phantom Blaq,' a limited-edition model boasting a matte finish, premium interiors, and advanced connectivity features. The company emphasizes its commitment to safety by introducing six airbags across its lineup and anticipates a sales recovery driven by the monsoon and upcoming festive season.
- **Jyoti Structures** secured a Rs 639 crore order for 765 kV and 400 kV transmission line projects in India on a turnkey engineering, procurement, and construction (EPC) basis.

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

Global News

- China's consumer prices were flat from a year earlier in July 2025, following a 0.1% gain in the previous month. On a monthly basis, the CPI rose 0.4% in July, reversing a 0.1% decline in June.
- China's producer prices fell 3.6% year-on-year in July 2025, matching June's pace. Month-on-month, the PPI declined 0.2%, slowing from a 0.4% fall in the preceding four months and marking the softest pace in five months.
- Taiwan's trade surplus rose to \$14.3 billion in July from \$4.9 billion in the corresponding month last year. The surplus also grew from \$12.1 billion in June. Exports surged 42.0% year-over-year in July, and imports climbed by 20.8%.

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

Economic News

- Crude Oil traded at US\$ 64.24/bbl (IST 17:00).
- INR strengthened to Rs. 87.66 from Rs. 87.67 against each US\$ resulting in daily change of 0.01%.
- Nirmala Sitharaman presented a revised Income Tax Bill in Lok Sabha. This followed withdrawal of the 2025 Bill. The new draft incorporates Select Committee suggestions. The aim is to replace the 1961 Act with an updated version. The earlier bill had drafting errors. The revised bill addresses ambiguity and improves clarity.

Key recommendations by the Select Committee

- The parliamentary panel had flagged multiple drafting errors and suggested amendments to reduce ambiguity:
- **Clause 21** (Annual value of property): Remove the term "in normal course" and add a clear comparison between actual rent and "deemed rent" for vacant properties.
- **Clause 22** (Deductions from house property income): Specify that the 30% standard deduction applies after deducting municipal taxes; extend pre-construction interest deduction to let-out properties.
- **Clause 19** (Salary deductions - Schedule VII): Allow commuted pension deductions for non-employees receiving pensions from a fund.
- **Clause 20** (Commercial property): Modify wording to avoid taxing temporarily unused business properties as "house property" income.

The Lok Sabha approved the Taxation Laws (Amendment) Bill, 2025, extending tax exemptions to subscribers of the Unified Pension Scheme. Introduced by Finance Minister Nirmala Sitharaman, the bill also includes modifications to block assessment for Income Tax search cases.

- The Central government is set to release Rs. 3,200 crore as the first installment of the Pradhan Mantri Fasal Bima Yojana,

benefiting approximately 30 lakh farmers affected by natural disasters. Insurance companies will face a 12% interest penalty for delayed payments, directly benefiting farmers.

- Indian banks are intensifying their scrutiny of loan applications from exporters, particularly concerning their exposure to the American market and strategies to mitigate the impact of US President Trump's tariffs. Lenders are assessing the financial implications of these levies on sectors like textiles and jewelry, posing more direct questions about cash flows and business continuity.
- India's foreign exchange reserves saw a decline. The Reserve Bank of India data showed a \$9.32 billion drop. The total reserves reached \$688.87 billion for the week ending August 1.

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

Forthcoming Events

Board Meetings as on 12/08/2025

Apollo Hospitals Enterprise Limited	Financial Results
Hindalco Industries Limited	Financial Results
Oil & Natural Gas Corporation Limited	Financial Results
Hindustan Aeronautics Limited	Financial Results
Cochin Shipyard Limited	Financial Results
63 moons technologies limited	Financial Results
Aarti Pharmalabs Limited	Financial Results
Aarvi Encon Limited	Financial Results
Aavas Financiers Limited	Financial Results
Alembic Limited	Financial Results
Alkem Laboratories Limited	Financial Results
Allcargo Logistics Limited	Financial Results
Amrutanjan Health Care Limited	Financial Results
Anjani Portland Cement Limited	Financial Results
Arrow Greentech Limited	Financial Results
Ashiana Housing Limited	Financial Results
Bajaj Hindusthan Sugar Limited	Financial Results
Balrampur Chini Mills Limited	Financial Results
Bharat Dynamics Limited	Financial Results
Bharat Rasayan Limited	Financial Results
Bharat Road Network Limited	Financial Results
Bodal Chemicals Limited	Financial Results
Bombay Burmah Trading Corporation Limited	Financial Results
CSL Finance Limited	Financial Results
Cyber Media (India) Limited	Financial Results
DCM Shriram Industries Limited	Financial Results

Denta Water and Infra Solutions Limited	Financial Results
Digidrive Distributors Limited	Financial Results
Dish TV India Limited	Financial Results
Dishman Carbogen Amcis Limited	Financial Results/Fund Raising
Dr. Agarwal's Health Care Limited	Financial Results
Ecos (India) Mobility & Hospitality Limited	Financial Results
Eldeco Housing And Industries Limited	Financial Results
Elgi Equipments Limited	Financial Results
Emami Realty Limited	Financial Results
EMS Limited	Financial Results
Finolex Cables Limited	Financial Results
FSN E-Commerce Ventures Limited	Financial Results
GIC Housing Finance Limited	Financial Results
Granules India Limited	Financial Results
GRM Overseas Limited	Financial Results
Gujarat Industries Power Company Limited	Financial Results
Gujarat State Petronet Limited	Financial Results
Heranba Industries Limited	Financial Results
Hercules Hoists Limited	Financial Results
Himatsingka Seide Limited	Financial Results
Hindware Home Innovation Limited	Financial Results
Honasa Consumer Limited	Financial Results
Honda India Power Products Limited	Financial Results/Dividend
India Tourism Development Corporation Limited	Financial Results
Indian Hume Pipe Company Limited	Financial Results
Indian Terrain Fashions Limited	Financial Results
Indiqube Spaces Limited	Financial Results
Indo Amines Limited	Financial Results
Indo Borax & Chemicals Limited	Financial Results
Indo Count Industries Limited	Financial Results
Indowind Energy Limited	Financial Results
Ingersoll Rand (India) Limited	Financial Results
Jayshree Tea & Industries Limited	Financial Results
JHS Svendgaard Laboratories Limited	Financial Results
Jindal Steel & Power Limited	Financial Results
Juniper Hotels Limited	Financial Results
Jupiter Wagons Limited	Financial Results
Jyothy Labs Limited	Financial Results
K S Oils Limited	Financial Results
Khadim India Limited	Financial Results
Kirloskar Electric Company Limited	Financial Results
Kirloskar Industries Limited	Financial Results
Landmark Cars Limited	Financial Results

Laxmi Dental Limited	Financial Results
Lokesh Machines Limited	Financial Results
Lotus Eye Hospital and Institute Limited	Financial Results
Lux Industries Limited	Financial Results
Madras Fertilizers Limited	Financial Results
Marksans Pharma Limited	Financial Results
Minda Corporation Limited	Financial Results
MRF Limited	Financial Results
Mrs. Bectors Food Specialities Limited	Financial Results/Stock Split
Nalwa Sons Investments Limited	Financial Results
Natco Pharma Limited	Financial Results/Dividend
Nazara Technologies Limited	Financial Results/Bonus/Stock split
NHPC Limited	Financial Results
NMDC Limited	Financial Results
NMDC Steel Limited	Financial Results
Oil India Limited	Financial Results
Orchid Pharma Limited	Financial Results
Orient Technologies Limited	Financial Results
P N Gadgil Jewellers Limited	Financial Results
PI Industries Limited	Financial Results
Polyplex Corporation Limited	Financial Results
Premier Explosives Limited	Financial Results/Fund Raising
R K Swamy Limited	Financial Results
Rail Vikas Nigam Limited	Financial Results
Rane Holdings Limited	Financial Results
Rashtriya Chemicals and Fertilizers Limited	Financial Results/Fund Raising
RattanIndia Enterprises Limited	Financial Results
RBZ Jewellers Limited	Financial Results
Religare Enterprises Limited	Financial Results
Renaissance Global Limited	Financial Results
Rico Auto Industries Limited	Financial Results
Rupa & Company Limited	Financial Results
S&S Power Switchgears Limited	Financial Results
Selan Exploration Technology Limited	Financial Results
Senco Gold Limited	Financial Results
Shriram Properties Limited	Financial Results
Smartworks Coworking Spaces Limited	Financial Results
Sundaram Multi Pap Limited	Financial Results
Suzlon Energy Limited	Financial Results
Tarsons Products Limited	Financial Results
Texmo Pipes and Products Limited	Financial Results
The Karnataka Bank Limited	Financial Results
TIL Limited	Financial Results

TVS Srichakra Limited	Financial Results
Unicommerce Esolutions Limited	Financial Results
Univastu India Limited	Financial Results
Usha Martin Education & Solutions Limited	Financial Results
Usha Martin Limited	Financial Results
VA Tech Wabag Limited	Financial Results
Vadilal Industries Limited	Financial Results
Venus Pipes & Tubes Limited	Financial Results
Windlas Biotech Limited	Financial Results
Wonder Electricals Limited	Financial Results
Zee Learn Limited	Financial Results
ZF Commercial Vehicle Control Systems India Limited	Financial Results
ZUARI INDUSTRIES LIMITED	Financial Results
Zydus Lifesciences Limited	Financial Results

(Source: NSE)

Corporate Actions as on 12/08/2025

Arvind Fashions Limited	Dividend - Rs 1.60 Per Share
Dwarikesh Sugar Industries Limited	Dividend - Re 0.50 Per Share
Grasim Industries Limited	Dividend - Rs 10 Per Share
H.G. Infra Engineering Limited	Dividend - Rs 2 Per Share
ICICI Bank Limited	Dividend - Rs 11 Per Share
India Glycols Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 5/- Per Share
India Pesticides Limited	Dividend - Re 0.75 Per Share
NGL Fine-Chem Limited	Dividend - Rs 1.75 Per Share
RITES Limited	Interim Dividend - Rs 1.30 Per Share

(Source: NSE)

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