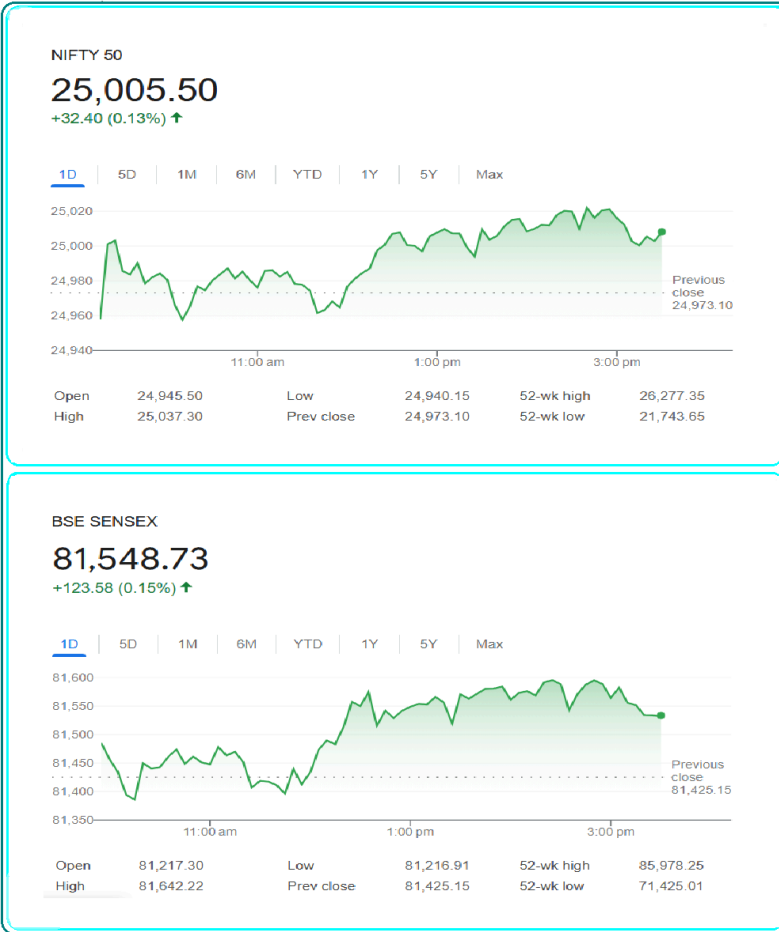


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	25005.50	24973.10	<b>0.13%</b>
<b>S&amp;P BSE SENSEX</b>	81548.73	81425.15	<b>0.15%</b>
<b>NIFTY MID100</b>	58043.55	57999.55	<b>0.08%</b>
<b>NIFTY SML100</b>	17875.20	17874.60	<b>0.00%</b>

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

## Market Wrap Up

- The key equity benchmarks ended with decent gains today, amid positive global cues. Market mood remained buoyant on hopes of thawing India-U.S. diplomatic tensions and rate-cut expectations from the U.S. Federal Reserve next week. The Nifty ended above the 25,000 level after hitting the day's low of 24,940.15.
- The S&P BSE Sensex added 123.58 points or 0.15% to 81,548.73. The Nifty 50 index rose 32.40 points or 0.13% to 25,005.50. In the past seven trading sessions, the Nifty 50 index jumped 1.73%.
- The S&P BSE Mid-Cap index rose 0.14% and the S&P BSE Small-Cap index fell 0.01%. The market breadth was positive.
- Among the sectoral indices, the Nifty Oil & Gas index (up 1.10%), the Nifty Media index (up 1.02%) and the Nifty PSU Bank index (up 0.74%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (down 0.50%), the Nifty Auto index (down 0.33%) and the Nifty Consumer Durables index (down 0.29%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **September** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **1671** contracts at the end of the day.
- Long** position build up for the **September** series has been witnessed in **RELIANCE**, **BHEL**, **HDFCBANK**, **BAJFINANCE**.
- Short** position build up for the **September** series has been witnessed in **LT**, **ICICIBANK**, **INFY**.
- Unwinding** position for the **September** series has been witnessed in **BHARTIARTL**, **SBIN**, **ETERNAL**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54669.60	54536.00	0.24%
NIFTY AUTO	26744.45	26833.95	-0.33%
NIFTY FMCG	56960.60	56856.85	0.18%
NIFTY IT	36003.45	36183.80	-0.50%
NIFTY METAL	9792.95	9759.45	0.34%
NIFTY PHARMA	22224.00	22122.05	0.46%
NIFTY REALTY	883.80	883.80	0.00%
BSE CG	68487.66	68366.25	0.18%
BSE CD	61757.08	61786.71	-0.05%
BSE Oil & GAS	26241.72	25933.57	1.19%
BSE POWER	6660.86	6591.15	1.06%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	44372.50	43837.67	1.22%
HANG SENG	26086.32	26200.26	-0.43%
STRAITS TIMES	4355.82	4346.46	0.22%
SHANGHAI	3875.31	3812.22	1.65%
KOSPI	3344.20	3314.53	0.90%
JAKARTA	7747.90	7699.01	0.64%
TAIWAN	25215.71	25192.59	0.09%
KLSE COMPOSITE	1582.85	1590.75	-0.50%
ALL ORDINARIES	9071.40	9095.20	-0.26%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	96204.83	102041.40
NSE F&O	107170.65	135208.09

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	3472.37

(Source: [NSE](#))

## Corporate News

- **Jupiter Wagons Ltd.** announced that its material subsidiary, Jupiter Tatravagonka Railwheel Factory Pvt. Ltd., has secured a Letter of Acceptance from the Ministry of Railways for the supply of 9,000 FIAT axles used in LHB coaches. The order has an aggregate value of Rs. 113 Crore.
- **Rail Vikas Nigam Limited** has emerged as the lowest bidder (L1) for a major project awarded by West Central Railway. The contract has an aggregate value of Rs. 169.49 Crore, including applicable taxes.
- **Torrent Pharmaceuticals** announced that it is planning to acquire a 26% equity stake in Torrent Urja 27 Private Ltd. As per the details, it is a special purpose vehicle set up for a captive hybrid power project in Gujarat.
- **Kalpataru Projects International** said that it, along with its international subsidiaries, has secured new orders worth approximately Rs 2,720 crore.
- **Biocon** announced the inauguration of its first U.S. manufacturing facility in Cranbury, New Jersey, through its wholly owned subsidiary, Biocon Generics Inc. (BGI).
- **Adani Power** announced that it has received a letter of award (LoA) from MP Power Management Company (MPPMCL) for an additional 800 MW capacity under the 'greenshoe option'.
- **Cupid Ltd** has signed a term sheet to acquire a strategic stake in Mansam, a Saudi Arabian luxury fragrance brand. The investment, facilitated through a fund managed by GII Investment Management Limited, aims to expand Cupid's international presence and tap into new consumer-driven markets.
- **Maruti Suzuki** anticipates a rebound in domestic car sales. The company projects a 7% growth rate by the next fiscal year. This optimism stems from the government's GST cut on automobiles. Partho Banerjee of Maruti Suzuki forecasts stronger small car sales, estimating a 10% growth. Policy and monetary measures are expected to contribute to this recovery.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	620.05	604.80	2.52%
ADANIENT	2397.00	2340.20	2.43%
NTPC	331.05	325.65	1.66%
AXISBANK	1087.40	1070.10	1.62%
POWERGRID	286.80	282.95	1.36%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	1509.70	1532.60	-1.49%
BAJAJ-AUTO	9113.50	9244.00	-1.41%
EICHERMOT	6754.50	6836.50	-1.20%
SBILIFE	1814.20	1833.70	-1.06%
TITAN	3584.20	3620.60	-1.01%

(Source: [Moneycontrol](#))

- **UCO Bank** announces a reduction in its marginal cost of funds-based lending rates. The cut impacts various loan tenures by five basis points. The one-year MCLR now stands at 8.90%. Simultaneously, the bank has revised the yield on its 10-year government securities. The yield is raised to 6.78%. Other rates, including repo-linked rates, remain unchanged.
- **Eicher Motors** said that its unit VECV will transfer full GST cut benefits to customers. This shall be effective from September 22, 2025. Hence, there shall be a reduction in GST on diesel, CNG, and LNG vehicles to 18%. On the other hand, EVs still remain at 5% GST.
- **Tata Motors** said that its Jaguar Land Rover said that "some data" was impacted in the recent cybersecurity incident. This has disrupted the company's production and sales. The company is working in association with the authorities and said that will inform individuals if there is any impact on their data.
- **Adani Ports and Special Economic Zone** said that its step down subsidiary Mandhata Build Estate has executed a share purchase agreement (SPA) with Windson Projects LLP for acquiring 100% stake in Dependencia Logistics.
- **ACME Solar Holdings** announced that its wholly owned subsidiary, ACME Venus Urja, has secured long-term project financing worth Rs 3,892 crore from the State Bank of India (SBI).

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

## Global News

- U.S. producer price index for final demand edged down by 0.1% in August after climbing by a downwardly revised 0.7% in July. The annual rate of producer price growth slowed to 2.6% in August from a downwardly revised 3.1% in July. Core producer prices increased by 0.3% in August after climbing by 0.6% in July. The annual rate of growth by core producer prices crept up to 2.8% in August from 2.7% in July.
- U.S. wholesale inventories crept up by 0.1% in July after rising by an upwardly revised 0.2% in June.
- Japan's producer prices were down 0.2% on month in August, down from the upwardly revised 0.3% gain in July (originally 0.2%). On a yearly basis, producer prices were up 2.7% - up from the downwardly revised 2.5% increase in the previous month (originally 2.6%).

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

## Economic News

- Crude Oil traded at US\$ 62.98/bbl (IST 17:00).
- INR weakened to Rs. 88.46 from Rs. 88.11 against each US\$ resulting in daily change of 0.40%.
- To protect domestic manufacturers from inexpensive imports, the Directorate General of Trade Remedies (DGTR) has suggested imposing an anti-dumping duty on glass fibre from China, Bahrain, and Thailand for five years. The recommended duty varies from USD 194 to USD 394 per tonne.
- The recent GST rate revisions, particularly the reduction to 5% for mining sector items like marble and granite, are expected to positively impact the housing industry and small-scale enterprises. This change will lower construction costs, especially for low-cost housing in rural areas, and benefit artisans involved in brass and aluminum handicrafts.

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

## Forthcoming Events

### Board Meetings as on 12/09/2025

ICICI Prudential Life Insurance Company Limited

Fund Raising

(Source: NSE)

### Corporate Actions as on 12/09/2025

Cochin Shipyard Limited	Dividend - Rs 2.25 Per Share
Garden Reach Shipbuilders & Engineers Limited	Dividend - Rs 4.90 Per Share
CSL Finance Limited	Dividend - Rs 3 Per Share
Kajaria Ceramics Limited	Dividend - Rs 4 Per Share
Mastek Limited	Dividend - Rs 16 Per Share
Uttam Sugar Mills Limited	Dividend - Rs 2.50 Per Share
Vadilal Industries Limited	Dividend - Rs 21 Per Share
Vardhman Holdings Limited	Dividend - Rs 5 Per Share
Vardhman Special Steels Limited	Dividend - Rs 3 Per Share
Vardhman Textiles Limited	Dividend - Rs 5 Per Share
VLS Finance Limited	Dividend - Rs 1.50 Per Share
Bhansali Engineering Polymers Limited	Dividend - Re 1 Per Share
Bharat Rasayan Limited	Dividend - Rs 1.50 Per Share
Caplin Point Laboratories Limited	Dividend - Rs 3 Per Share

Coral India Finance & Housing Limited	Dividend - Re 0.40 Per Share
Gallantt Ispat Limited	Dividend - Rs 1.25 Per Share
HBL Engineering Limited	Dividend - Re 1 Per Share
HeidelbergCement India Limited	Dividend - Rs 7 Per Share
Krsnaa Diagnostics Limited	Dividend - Rs 2.75 Per Share
Mrs. Bectors Food Specialities Limited	Dividend - Rs 3 Per Share
New Delhi Television Limited	Rights 3:4 @ Premium Rs 78/-
RHI MAGNESITA INDIA LIMITED	Dividend - Rs 2.50 Per Share
Sandhar Technologies Limited	Dividend - Rs 3.50 Per Share
Sangam (India) Limited	Dividend - Rs 2 Per Sh
Sanghvi Movers Limited	Dividend - Rs 2 Per Share
Tatva Chintan Pharma Chem Limited	Dividend - Re 1 Per Share
Techno Electric & Engineering Company Limited	Dividend - Rs 9 Per Share

(Source: NSE)

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