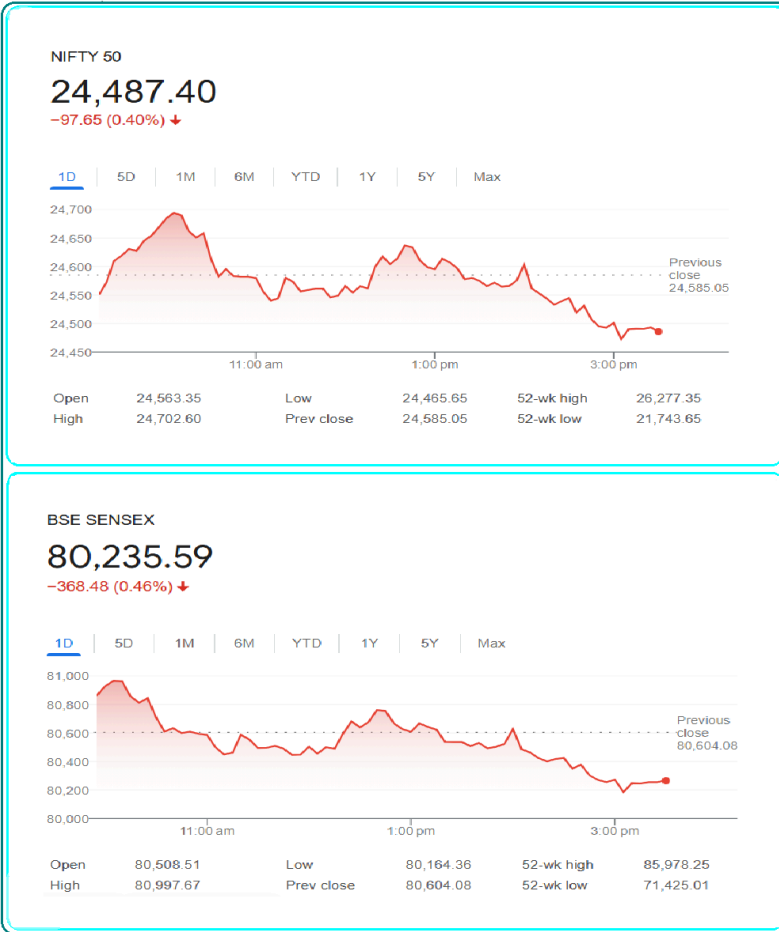


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24487.40	24585.05	-0.40%
S&P BSE SENSEX	80235.59	80604.08	-0.46%
NIFTY MID100	56324.85	56479.00	-0.27%
NIFTY SML100	17498.10	17491.70	0.04%

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

Market Wrap Up

- The domestic equity barometers ended a volatile session with modest losses today. Market participants will closely track FII activity while awaiting CPI data, scheduled for later today. The Nifty closed below the 24,500 level.
- The S&P BSE Sensex dropped 368.49 points or 0.46% to 80,235.59. The Nifty 50 index declined 97.65 points or 0.40% to 24,487.40.
- The S&P BSE Mid-Cap index shed 0.25% and the S&P BSE Small-Cap index rose 0.04%.
- Among the sectoral indices, the Nifty Pharma index (up 0.69%), the Nifty Media index (up 0.60%) and the Nifty Healthcare index (up 0.59%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Financial Services index (down 1.02%), the Nifty Bank index (down 0.84%) and the Nifty Private Bank index (down 0.81%) 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 **1986** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **LT, MARUTI, TATAMOTORS**.
- Short** position build up for the **August** series has been witnessed in **BHARTIARTL, ICICIBANK, HDFCBANK, BAJFINANCE, INFY**.
- Unwinding** position for the **August** series has been witnessed in **RELIANCE, SBIN**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55043.70	55510.75	-0.84%
NIFTY AUTO	23856.60	23723.75	0.56%
NIFTY FMCG	55034.45	55309.90	-0.50%
NIFTY IT	34674.30	34544.65	0.38%
NIFTY METAL	9229.70	9194.80	0.38%
NIFTY PHARMA	21753.50	21604.65	0.69%
NIFTY REALTY	883.90	890.40	-0.73%
BSE CG	66460.66	66966.61	-0.76%
BSE CD	58461.24	58760.13	-0.51%
BSE Oil & GAS	26342.44	26184.74	0.60%
BSE POWER	6644.27	6628.93	0.23%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	42718.17	41820.48	2.15%
HANG SENG	24969.68	24906.81	0.25%
STRAITS TIMES	4220.72	4232.78	-0.28%
SHANGHAI	3665.92	3647.55	0.50%
KOSPI	3189.91	3206.77	-0.53%
JAKARTA	7791.70	7605.92	2.44%
TAIWAN	24158.36	24135.50	0.09%
KLSE COMPOSITE	1567.90	1563.24	0.30%
ALL ORDINARIES	9150.30	9117.60	0.36%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	79108.56	81193.79
NSE F&O	130795.38	127733.65

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	3398.80

(Source: [NSE](#))

Corporate News

- **MRF** reported a 12.35% decline in consolidated net profit to Rs 500.47 crore in Q1 FY26, compared to Rs 571.02 crore posted in Q1 FY25. Revenue rose 6.65% year-on-year (YoY) to Rs 7,675.69 crore for the quarter ended 30 June 2025.
- **Hindustan Aeronautics'** consolidated net profit declined 3.71% to Rs 1,383.77 crore in Q1 FY26 as against Rs 1,437.16 crore posted in Q1 FY25. Revenue was at Rs 4,819.01 crore in Q1 FY26, up 10.84% as against Rs 4,347.5 crore recorded in Q1 FY25.
- **Zydus Lifesciences** posted consolidated net profit rose 3.30% to Rs 1466.80 crore in the quarter ended June 2025 as against Rs 1419.90 crore during the previous quarter ended June 2024. Sales rose 6.95% to Rs 6467.00 crore in the quarter ended June 2025 as against Rs 6046.50 crore during the previous quarter ended June 2024.
- **Natco Pharma** posted consolidated net profit declined 28.09% to Rs 480.70 crore in the quarter ended June 2025 as against Rs 668.50 crore during the previous quarter ended June 2024. Sales declined 2.47% to Rs 1328.90 crore in the quarter ended June 2025 as against Rs 1362.60 crore during the previous quarter ended June 2024.
- **Marksans Pharma** posted consolidated net profit dropped 34.3% to Rs 58.31 crore despite of 4.97% jump in revenue from operations to Rs 619.98 crore in Q1 FY26 over Q1 FY25.
- **Hindalco Industries** posted consolidated net profit rose 30.25% to Rs 4004.00 crore in the quarter ended June 2025 as against Rs 3074.00 crore during the previous quarter ended June 2024. Sales rose 12.66% to Rs 64232.00 crore in the quarter ended June 2025 as against Rs 57013.00 crore during the previous quarter ended June 2024.
- VinFast Auto India has partnered with **HDFC Bank** to provide auto and inventory financing for its dealer network, marking VinFast's first banking partnership in India. This collaboration aims to offer seamless credit solutions ahead of VinFast's launch of VF7 and VF6 models before the festival season.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
MARUTI	12840.00	12597.00	1.93%
TECHM	1509.30	1481.10	1.90%
HEROMOTOCO	4645.20	4562.20	1.82%
M&M	3236.50	3186.20	1.58%
NTPC	340.10	336.15	1.18%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
BAJFINANCE	853.00	877.80	-2.83%
TRENT	5365.50	5443.50	-1.43%
HINDUNILVR	2483.80	2518.40	-1.37%
HDFCBANK	1969.90	1995.60	-1.29%
NESTLEIND	1091.10	1105.00	-1.26%

(Source: [Moneycontrol](#))

- Pfizer** has introduced its 20-valent pneumococcal conjugate vaccine (PCV20) for adults in India, offering protection against 20 serotypes responsible for a majority of pneumococcal diseases. This single-dose vaccine provides timely and proactive protection for all adults, including those with chronic conditions, potentially eliminating the need for a second dose.
- Indian Hotels Company** is set to acquire a 51% stake in ANK Hotels and Pride Hospitality for approximately Rs. 204 crore, adding 135 hotels under the Clarks Hotels & Resorts brand.
- Lupin** has partnered with Sandoz Group AG to commercialize its biosimilar ranibizumab across multiple regions, with Sandoz handling commercialization in the EU (excluding Germany), Switzerland, Norway, Australia, Hong Kong, Vietnam, and Malaysia.
- Karur Vysya Bank** is expanding its reach by opening new branches in Maharashtra, Andhra Pradesh, and Tamil Nadu, offering a full suite of banking services to meet customer needs.
- Mahindra & Mahindra** is divesting Sampo Rosenlew Oy, a Finnish combine harvester manufacturer, as part of its strategy to focus on core businesses and improve capital allocation. M&M acquired full control of Sampo in 2022, but the company has struggled with weak demand and development costs.
- Inox Green Energy Services** announced it had signed a long-term operations and maintenance (O&M) agreement with one of India's largest and most diversified conglomerates.
- HBL Engineering** received a letter of acceptance (LoA) worth Rs 54.12 crore from West Central Railway.
- Bata India** reported a 70.13% decline in consolidated net profit to Rs 51.99 crore, while revenue from operations decreased by 0.29% to Rs 941.85 crore in Q1 FY26 over Q1 FY25.
- Larsen & Toubro** has secured an ultra-mega contract from **Adani Power** to establish eight thermal power units, each with 800 MW capacity, totaling 6,400 MW.
- Britannia Industries** focuses on health and wellness. The company is increasing whole grain content. It is also reducing sugar and sodium levels in its products.
- Sterlite Electric Ltd** has secured orders worth Rs 1,500 crore in Q1 FY'26, driven by green energy projects and exports. The company's advanced conductors, power cables, and OPGW products are in high demand across domestic and international markets.
- Bank of Baroda's** bob ₹ Pay app now offers international UPI services, enabling cross-border payments for Indian and NRI customers. Features include UPI Global Acceptance in eight countries, real-time remittances from Singapore, and UPI access for NRIs with NRE/NRO accounts. The app facilitates convenient and flexible digital transactions with a limit of Rs. 1,00,000 per transaction.

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

Global News

- U.K. unemployment rate stood at 4.7% in the three months to June 2025, unchanged from the previous period. The number of people claiming unemployment benefits decreased by 6.2 thousand to 1.695 million in July 2025, following a revised 15.5 thousand drop in the previous month.
- Eurozone ZEW Economic Sentiment fell by 11 points from the prior month to 25.1 in August 2025. The current economic situation decreased by 7 points to -31.2.
- Germany's ZEW Economic Sentiment decreased for the first time in four months to 34.7 in August 2025, compared to 52.7 in July. The current economic situation has also deteriorated, with the Current Conditions index declining to -68.6 from -59.5.
- The Reserve Bank of Australia slashed its cash rate by 25bps to 3.6% at its August meeting.

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

Economic News

- Crude Oil traded at US\$ 63.54/bbl (IST 17:00).
- INR weakened to Rs. 87.71 from Rs. 87.67 against each US\$ resulting in daily change of 0.05%.
- India's consumer price inflation declined to 1.55% in July 2025. This is down from 2.10% in June 2025 and marks a 55-basis-point drop month-on-month.
- India's gross direct tax collections declined 1.8% year-on-year to Rs 7.99 trillion in the period from April 1 to August 11.
- India and Zambia have formalized a trade agreement to bolster cooperative alliances, as announced by Cooperation Minister Amit Shah. This initiative aims to fortify India's cooperative export network through its international missions. Furthermore, National Cooperative Exports Ltd (NCEL) has signed MoUs with entities in Senegal and Indonesia to expand trade opportunities.
- The Lok Sabha approved the new income tax bill, eliminating alternate minimum tax on LLPs and allowing refund claims even without timely return filings. Replacing the 1961 Act, the bill simplifies language, redefines terms like 'tax year,' and incorporates select committee recommendations. It maintains loss carry forward provisions, tweaks MSME definitions, and reintroduces deductions for inter-corporate dividends.
- India broadens its export focus to fifty nations, including those in West Asia and Africa. This move aims to lessen dependence on one market. It also seeks to cushion against trade disruptions amid high US tariffs. The government is devising strategies to protect exports from these tariffs. They are also exploring alternative markets and domestic demand to absorb affected goods.
- India has expanded its ban on jute product imports from Bangladesh via land routes, now including woven fabrics, twine, and sacks. This restriction, following earlier curbs in June, allows imports only through Nhava Sheva Seaport. These

measures, alongside previous restrictions on garments and transshipment, reflect growing tensions and concerns over trade imbalances and political issues.

- India's ethanol production push, fueled by corn and rice, is inadvertently creating a DDGS surplus, undermining oilseed cultivation. Farmers are shifting to corn due to low soybean prices, impacting domestic oilseed production. Consequently, India's edible oil imports are projected to rise, exacerbating its dependence on foreign suppliers and potentially driving global prices higher, despite government efforts to support oilseed farmers.
- Paddy sowing during this kharif season has seen a significant increase of 12%, reaching 364.80 lakh hectares compared to last year's 325.36 lakh hectares. The total sowing area for all kharif crops has also risen to 995.63 lakh hectares. While pulses, coarse cereals, and sugarcane witnessed increased sowing, oilseeds and cotton experienced a decrease in acreage.

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

Forthcoming Events

Board Meetings as on 13/08/2025

Bharat Petroleum Corporation Limited	Financial Results
Dredging Corporation of India Limited	Financial Results/Fund Raising
Endurance Technologies Limited	Financial Results
Engineers India Limited	Financial Results
Godrej Industries Limited	Financial Results
Aarey Drugs & Pharmaceuticals Limited	Financial Results
Aditya Birla Fashion and Retail Limited	Financial Results
Aditya Birla Lifestyle Brands Limited	Financial Results
Ador Welding Limited	Financial Results
AIA Engineering Limited	Financial Results
Akme Fintrade (India) Limited	Financial Results/Fund Raising
Alpa Laboratories Limited	Financial Results
Anthem Biosciences Limited	Financial Results
Anupam Rasayan India Limited	Financial Results
Apollo Sindoori Hotels Limited	Financial Results
Archidply Decor Limited	Financial Results
Archies Limited	Financial Results
Aries Agro Limited	Financial Results
Arman Financial Services Limited	Financial Results
Asian Granito India Limited	Financial Results
Asian Hotels (North) Limited	Financial Results
Astra Microwave Products Limited	Financial Results
Autoline Industries Limited	Financial Results
Avanti Feeds Limited	Financial Results

Balkrishna Paper Mills Limited	Financial Results
Bang Overseas Limited	Financial Results
BF Utilities Limited	Financial Results
Bhansali Engineering Polymers Limited	Financial Results/Dividend
Black Box Limited	Financial Results
Brainbees Solutions Limited	Financial Results
Brigade Enterprises Limited	Financial Results
Campus Activewear Limited	Financial Results/Dividend
Cohance Lifesciences Limited	Financial Results
Confidence Petroleum India Limited	Financial Results
COSMO FIRST LIMITED	Financial Results
CSB Bank Limited	Financial Results
Deepak Nitrite Limited	Financial Results
Devyani International Limited	Financial Results
Dharmaj Crop Guard Limited	Financial Results
DIC India Limited	Financial Results
Essar Shipping Limited	Financial Results
Everest Kanto Cylinder Limited	Financial Results
Fedders Electric and Engineering Limited	Financial Results
Fertilizers and Chemicals Travancore Limited	Financial Results/Dividend
Fiem Industries Limited	Financial Results
Foods & Inns Limited	Financial Results
Galaxy Surfactants Limited	Financial Results
GE Power India Limited	Financial Results
Global Vectra Helicorp Limited	Financial Results
Goa Carbon Limited	Financial Results
Gufic Biosciences Limited	Financial Results
Gujarat Apollo Industries Limited	Financial Results
Gujarat Pipavav Port Limited	Financial Results
Gulf Oil Lubricants India Limited	Financial Results
GVK Power & Infrastructure Limited	Financial Results
H.G. Infra Engineering Limited	Financial Results
Hindustan Copper Limited	Financial Results
India Nippon Electricals Limited	Financial Results
Indian Railway Catering And Tourism Corporation Limited	Financial Results
Indogulf Cropsciences Limited	Financial Results
IndoStar Capital Finance Limited	Financial Results
Ind-Swift Laboratories Limited	Financial Results
Insecticides (India) Limited	Financial Results
Isgec Heavy Engineering Limited	Financial Results
ITI Limited	Financial Results
JBF Industries Limited	Financial Results
JHS Svendgaard Retail Ventures Limited	Financial Results

Jindal Photo Limited	Financial Results
Jubilant Foodworks Limited	Financial Results
Kalpataru Limited	Financial Results
Kaveri Seed Company Limited	Financial Results
Kohinoor Foods Limited	Financial Results
Laxmi India Finance Limited	Financial Results
Mahanagar Telephone Nigam Limited	Financial Results
Man Infraconstruction Limited	Financial Results
Matrimony.Com Limited	Financial Results
Max Healthcare Institute Limited	Financial Results
MIRC Electronics Limited	Financial Results/Fund Raising
Mishra Dhatu Nigam Limited	Financial Results
Mstc Limited	Financial Results
Munjal Auto Industries Limited	Financial Results
Muthoot Finance Limited	Financial Results
Nuvama Wealth Management Limited	Financial Results
OnMobile Global Limited	Financial Results
Pennar Industries Limited	Financial Results
Pfizer Limited	Financial Results
PNC Infratech Limited	Financial Results
Royal Orchid Hotels Limited	Financial Results
Salasar Techno Engineering Limited	Financial Results
Samhi Hotels Limited	Financial Results
Sammaan Capital Limited	Financial Results
Samvardhana Motherson International Limited	Financial Results
Shalby Limited	Financial Results
Shilpa Medicare Limited	Financial Results/Bonus
Simplex Infrastructures Limited	Financial Results
Somany Ceramics Limited	Financial Results
SRG Housing Finance Limited	Financial Results
Stanley Lifestyles Limited	Financial Results
Surya Roshni Limited	Financial Results
Suven Life Sciences Limited	Financial Results
Swelect Energy Systems Limited	Financial Results
Texmaco Rail & Engineering Limited	Financial Results
Tolins Tyres Limited	Financial Results
TVS Electronics Limited	Financial Results
UFLEX Limited	Financial Results
Uma Exports Limited	Financial Results
United Spirits Limited	Financial Results
Veedol Corporation Limited	Financial Results
Ventive Hospitality Limited	Financial Results
Vesuvius India Limited	Financial Results

Veto Switchgears And Cables Limited	Financial Results
Vishal Mega Mart Limited	Financial Results
Vishnu Prakash R Punglia Limited	Financial Results
Welspun Investments and Commercials Limited	Financial Results

(Source: NSE)

Corporate Actions as on 13/08/2025

Brigade Enterprises Limited	Dividend - Rs 2.50 Per Share
Container Corporation of India Limited	Interim Dividend - Rs 1.60 Per Share
Godrej Consumer Products Limited	Interim Dividend - Rs 5 Per Share
HEG Limited	Dividend - Rs 1.80 Per Share
Hitachi Energy India Limited	Dividend - Rs 6 Per Share
InterGlobe Aviation Limited	Dividend - Rs 10 Per Share
MPS Limited	Dividend - Rs 50 Per Share
NBCC (India) Limited	Interim Dividend - Re 0.21 Per Share
Page Industries Limited	Dividend - Rs 150 Per Share
Pidilite Industries Limited	Special Dividend - Rs 10 Per Share
Precot Limited	Dividend - Rs 3 Per Share
Railtel Corporation Of India Limited	Dividend - Re 0.85 Per Share
Rain Industries Limited	Interim Dividend - Re 1 Per Share
Sun TV Network Limited	Interim Dividend - Rs 5 Per Sh
The South Indian Bank Limited	Dividend - Rs 0.40 Per Share

(Source: NSE)

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