EQUITY DAILY REPORT

13th July 2026

SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

Index Chart

(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24211.00	24206.90	**0.02%**
S&P BSE SENSEX	77616.40	77569.39	**0.06%**
NIFTY MID100	63040.95	63036.80	**0.01%**
NIFTY SML100	19422.95	19416.50	**0.03%**

(Source: NSE, BSE)

Market Wrap Up

- The key equity barometers ended marginally higher, as investors shrugged off concerns over the escalating US-Iran conflict and turned their attention to stock-specific action and the ongoing first-quarter earnings season. After opening lower on heightened geopolitical concerns, the market recovered through the session to end near the flat line. Nifty ended above the 24,200 level.

- The S&P BSE Sensex advanced 47.04 points or 0.06% to 77,616.40. The Nifty 50 index rose 4.10 points or 0.02% to 24,211.

- The BSE 150 MidCap Index rose 0.02% and the BSE 250 SmallCap Index rose 0.25%. The market breadth was positive.

- Among the sectoral indices, the Nifty IT index (up 3.59%), the Nifty Media index (up 2.09%) and the Nifty Consumer Durables index (up 1.15%) outperformed the Nifty 50 index.

- Meanwhile, the Nifty FMCG index (down 2.73%), the Nifty Metal index (down 0.77%) and the Nifty Healthcare index (down 0.26%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **July** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **1137** contracts at the end of the day.

- **Long** position build up for the **July** series has been witnessed in **SBIN**, **ICICIBANK**, **BAJFINANCE**, **INFY**.

- **Short** position build up for the **July** series has been witnessed in **RELIANCE**, **BHARTIARTL**, **HDFCBANK**.

- **Unwinding** position for the **July** series has been witnessed in **WIPRO**, **ETERNAL**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	58131.45	58045.90	0.15%
NIFTY AUTO	26981.50	26860.75	0.45%
NIFTY FMCG	48809.90	49310.60	-1.02%
NIFTY IT	29015.85	28010.35	3.59%
NIFTY METAL	12601.45	12688.90	-0.69%
NIFTY PHARMA	25643.35	25674.10	-0.12%
NIFTY REALTY	937.15	938.60	-0.15%
BSE CG	78453.75	79102.08	-0.82%
BSE CD	62366.89	62002.68	0.59%
BSE Oil & GAS	26323.51	26323.04	0.00%
BSE POWER	7826.83	7831.63	-0.06%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	67242.73	68557.73	-1.92%
HANG SENG	24213.72	24175.12	0.16%
STRAITS TIMES	5470.34	5469.29	0.02%
SHANGHAI	3913.79	3996.16	-2.06%
KOSPI	6806.93	7475.94	-8.95%
JAKARTA	6037.84	5924.36	1.92%
TAIWAN	45380.52	45354.61	0.06%
KLSE COMPOSITE	1698.44	1691.49	0.41%
All ORDINARIES	9003.00	9003.70	-0.01%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	121684.26	122159.83
NSE F&O	153583.14	136877.80

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	3062.27

(Source: NSE)

Corporate News

- **L&T Finance** reported a 28.72% year-on-year (YoY) increase in consolidated net profit to Rs 902.47 crore for the quarter ended 30 June 2026 (Q1 FY27), compared with Rs 701.10 crore posted in Q1 FY26. Total revenue from operations jumped 22.38% YoY to Rs 5,212.92 crore in Q1 FY27.

- **LTM** has reported a 5.86% quarter-on-quarter (QoQ) increase in consolidated net profit to Rs 1,468.6 crore on a 2.80% rise in revenue from operations to Rs 11,608 crore in Q1 FY27 over Q4 FY26.

- **Bajaj Consumer Care** posted consolidated net profit rose 84.82% to Rs 70.75 crore in the quarter ended June 2026 as against Rs 38.28 crore during the previous quarter ended June 2025. Sales rose 28.27% to Rs 341.42 crore in the quarter ended June 2026 as against Rs 266.18 crore during the previous quarter ended June 2025.

- **Avenue Supermarts** reported an 11.33% increase in consolidated net profit to Rs 860.61 crore for the first quarter of FY27, compared with Rs 772.97 crore in the corresponding quarter last year. Revenue from operations rose 14.88% to Rs 18,794.53 crore in Q1 FY27 as against Rs 16,359.70 crore in Q1 FY26.

- **Just Dial** reported 66.2% jump in net profit to Rs 166.3 crore in Q1 FY27 from Rs 100 crore in Q4 FY26. The company's net profit has risen by 4.1% year-on-year, compared with Rs 159.6 crore in Q1 FY26. Operating revenue for the period under review was Rs 327.5 crore, up 9.9% YoY.

- **Avantel** reported a 67.39% year-on-year increase in consolidated net profit to Rs 5.39 crore in Q1 FY27, compared with Rs 3.22 crore in Q1 FY26. Revenue from operations rose 35.65% year-on-year to Rs 70.42 crore in Q1 FY27.

- **Reliance Industries Limited** is preparing to explore its eastern Sohagpur block. This move aims to augment gas production from its coal bed methane blocks. The company will begin with a test-phase investment estimated between ?300-400 crore. This cautious, phased entry supports future resource additions and production expansion. Groundwork and planning for the eastern

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TCS	2181.50	2069.00	**5.44%**
HCLTECH	1221.20	1164.10	**4.91%**
TECHM	1504.50	1454.80	**3.42%**
INFY	1102.60	1068.00	**3.24%**
BAJAJ-AUTO	10381.00	10156.00	**2.22%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
GRASIM	3144.30	3213.60	**-2.16%**
TATASTEEL	187.11	191.19	**-2.13%**
NESTLEIND	1427.00	1455.20	**-1.94%**
INDIGO	5229.50	5312.00	**-1.55%**
ETERNAL	285.20	289.65	**-1.54%**

(Source: Moneycontrol)

- **Bharti Airtel** chairman Sunil Mittal highlighted finance, data centres, and cloud as key growth areas. The company is expanding its digital infrastructure network after significant past investments. Airtel Money received RBI approval to operate as a non-deposit-taking NBFC. Nxtra is building data centre capacity while Airtel Cloud offers sovereign cloud solutions. The telco also reported strong operating free cash flow for future investments.

- **JBM Auto**'s subsidiary, JBM Electric Vehicles (JBMEV), signed a memorandum of understanding (MoU) with electric commercial vehicle leasing platform Drivn to supply 500 electric luxury buses.

- **Zelio E-Mobility** has announced the opening of its new manufacturing facility in Coimbatore, Tamil Nadu, marking a major step in the company's strategic expansion across South India.

- **BCL Industries** has completed the commissioning of another 150 KLPD Ethanol dedicated brownfield expansion at Bathinda (Punjab) taking the plant's distillery capacity to 550 KLPD at Bathinda.

block are currently underway.

- **Tata Motors** celebrates Sierra sales milestone with new Jubilee Edition packs. These dealer-fitted accessory bundles enhance the SUV's appearance and convenience features. Buyers can select from curated packs or choose individual accessories for personalization. The Smart+, Pure, and Adventure Jubilee Editions offer distinct styling and functional upgrades. Pricing details for these accessory packages are available at dealerships.

- **Siemens Ltd** has secured a significant Rs 263 crore order from Rail Vikas Nigam Ltd. This order is for supplying overhead rail electrification technologies for a key project. The Rishikesh-Karnaprayag rail line project will enhance connectivity in the Himalayan region. This initiative is part of the strategically important Char Dham connectivity corridor. The project aims to improve all-weather transport and regional economic development.

- **Tata Consultancy Services** announced an expanded collaboration with ABB, a global technology leader in electrification and automation, to transform its global network operations. The engagement marks the next phase of a trusted 20-year partnership.

- **NMDC** reduced the prices of Baila Lump and Baila Fines with effect from 10 July 2026. The state-owned miner cut the price of Baila Lump (65.5%, 10-40 mm) by Rs 250 per tonne to Rs 5,450 per tonne in July'26 from Rs 5,700 per tonne in June'26. It also reduced the price of Baila Fines (64%, -10 mm) by Rs 150 per tonne to Rs 4,700 per tonne from Rs 4,850 per tonne.

- **RITES** announced that, as part of a consortium, it has secured a consultancy contract worth Rs 79.22 crore from the Patna Metro Rail Corporation for the implementation of the Patna Metro Rail Construction Project.

- **Avenue Supermarts** slipped 2.34% to Rs 3,985.30 after the company reported slower growth in mature stores, with same-store sales growth moderating and performance in large metro markets remaining flat during the first quarter.

- **RPG Life Sciences and Archerchem Healthcare** have partnered to launch a new medication. This combination drug offers anti-inflammatory benefits with gastroprotection for patients. RPG Life Sciences will exclusively market and distribute this new product nationwide.

- **Power Finance Corporation** announced that its wholly owned subsidiary, PFC Consulting has incorporated a special purpose vehicle (SPV) named Satara Power Transmission. This SPV will be transferred to the successful bidder selected through International Competitive Bidding Process under Tariff Based Competitive Bidding Guidelines for Transmission Service issued by Ministry of Power.

- **Gujarat Pipavav Port** reported a 2.4% increase in container volumes to 1.68 lakh twenty-foot equivalent units (TEUs) in Q1 FY27, compared with 1.64 lakh TEUs in Q1 FY26.

- **Nexon Geochem** will collaborate with Russia's Giredmet for rare-earth processing technology. This partnership aims to build integrated facilities for rare earth value chain development. The company plans a scalable sintered NdFeB permanent magnet manufacturing facility in Hyderabad. This initiative addresses India's critical gap in rare earth processing and magnet production.

(Source: Business Standard, Economic Times, Smart investor)

Global News

- Canada's unemployment rate eased to 6.5% in June of 2026 from 6.6% in the previous month.
- Finland’s current account recorded a deficit of EUR 563 million in May 2026, shifting from a surplus of EUR 367 million in the corresponding month of the previous year.
- Mexico's industrial production fell 0.7% year-on-year in May 2026, reversing a 2.3% increase in April.

(Source: Market Watch, RTT News, Reuters, Bloomberg)

Economic News

- Crude Oil traded at US$ 73.79/bbl (IST 17:00).
- INR weakened to Rs. 95.63 from Rs. 95.33 against each US$ resulting in daily change of 0.31%.
- CIndian inflation rate surged to 4.38% in June of 2026 from 3.93% in the earlier month, the highest since December of 2024. From the previous month, the Indian CPI rose 1.03%, the most since January 2025.
- India's merchandise trade deficit widened to $30.43 billion in June 2026 from $28. 21 billion in May. Imports came in at $70.84 billion versus $73.41 billion in May, while goods exports stood at $40.41 billion compared to $45.20 billion.
- The India-UK trade agreement, effective July 15, offers Indian exports significant market share growth. This historic deal removes tariffs on many Indian goods entering the United Kingdom. British products like chocolate and auto parts will see reduced import duties in India. Indian companies can now bid on non-sensitive government procurement contracts

in the UK. The agreement addresses trade barriers, benefiting sectors like steel and marine products.

- In the wake of an increase in the FDI limit, Japan's Sompo Holdings is keen on expanding its operations in India, viewing it as a crucial market for future endeavors. With aspirations to utilize their global knowledge, Sompo aims to bolster Universal Sompo's growth and potentially venture into various well-being sectors within India, showcasing a steadfast dedication to the Indian market.
- The recycling industry is urging the government to abolish a duty on aluminium scrap. This removal will lower input costs for domestic manufacturers and recyclers. India currently imports most of its aluminium scrap to meet industrial demand. The secondary aluminium sector supports many jobs and contributes to the circular economy. Other major base metal scraps already enjoy duty-free import status in India.
- India and New Zealand established a Strategic Partnership, aiming for enhanced cooperation. They adopted a 2030 roadmap to guide joint actions over the next four years. Both nations agreed to double bilateral trade to NZD 7 billion by 2030. The leaders welcomed the signing of a comprehensive Free Trade Agreement. Cooperation will expand across trade, agriculture, and innovation sectors.
- Indian banks are now mandated to disclose their anti-money laundering measures concerning international business partners. Corporations with overseas investments will relay this information to the Reserve Bank of India.
- More than 1.7 crore income tax returns have been filed for the 2025-26 fiscal year. Over ten lakh returns were submitted on Friday alone by taxpayers. The deadline for filing ITRs 1 and 2 is July thirty-first. ITR Form 1 is for individuals with income up to fifty lakh rupees. ITR-2 is for individuals and HUFs with capital gains income.
- India's automotive sector recorded its lowest quarterly deals transaction volumes in three years at a total of USD 717 million in Q2 2026.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 14/07/2026

Anand Rathi Share and Stock Brokers Limited	Financial Results/Fund Raising
Jindal Saw Limited	Financial Results
L&T Technology Services Limited	Financial Results
Tata Elxsi Limited	Financial Results
Ballarpur Industries Limited	Fund Raising
Den Networks Limited	Financial Results
A2Z Infra Engineering Limited	Financial Results
Aditya Birla Money Limited	Financial Results
SG Finserve Limited	Financial Results
Viji Finance Limited	Financial Results

(Source: NSE)

Corporate Actions as on 14/07/2026

UTI Asset Management Company Limited	Dividend - Rs 40 Per Share
Hester Biosciences Limited	Dividend - Rs 11 Per Share
India Motor Parts and Accessories Limited	Dividend - Rs 23 Per Share
Aditya Birla Real Estate Limited	Dividend - Rs 2.50 Per Share
Pix Transmissions Limited	Dividend - Rs 9 Per Share
Supreme Petrochem Limited	Dividend - Rs 8 Per Share
Ultramarine & Pigments Limited	Dividend - Rs 6 Per Share

(Source: NSE)

DISCLAIMER

This document has been prepared by Shriram Insight Share Brokers Ltd. and is meant for sole use by the recipient and not for circulation. This document is not to be reported or copied or made available to others. The information contained herein is from sources believed reliable. It should not be considered as an offer to sell or a solicitation to buy any security or as an official confirmation of any transaction. We do not represent that it is accurate or complete and it should not be relied upon as such. This document is prepared for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The investments discussed or recommended in this report may not be suitable for all investors. Shriram Insight Share Brokers Ltd. Stock Recommendation Service is a general recommendation service and is not to be construed as an individual investor-specific Portfolio Management and Advisory Service.

The user assumes the entire risk of any use made of this information. Each recipient of this document should arrive at an independent evaluation of an investment in the securities of companies referred to in this document and should consult their own advisors to determine the merits and risks of such an investment.

Shriram Insight Share Brokers Ltd. shall not be responsible for any loss or liability incurred to the user as a consequence of his or any other person on his behalf taking any investment decisions based on the information, recommendations, research reports, analysis, quotes, etc. provided on the web site.

Shriram Insight Share Brokers Ltd shall not be liable for errors, omissions or typographical errors, disruption delay, interruption, failure, deletion or defect of/in the Service provided by it.

All Users of the Service in countries other than India understand that by using the Service, they may be violating the local laws in such countries. If the User chooses to access the Service from outside India, he shall be responsible for compliance with foreign and local laws.

EQUITIES | DERIVATIVES | COMMODITIES | DP SERVICES | MUTUAL FUNDS | RESEARCH

SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : helpdesk@shriraminsight.com | www.shriraminsight.com |