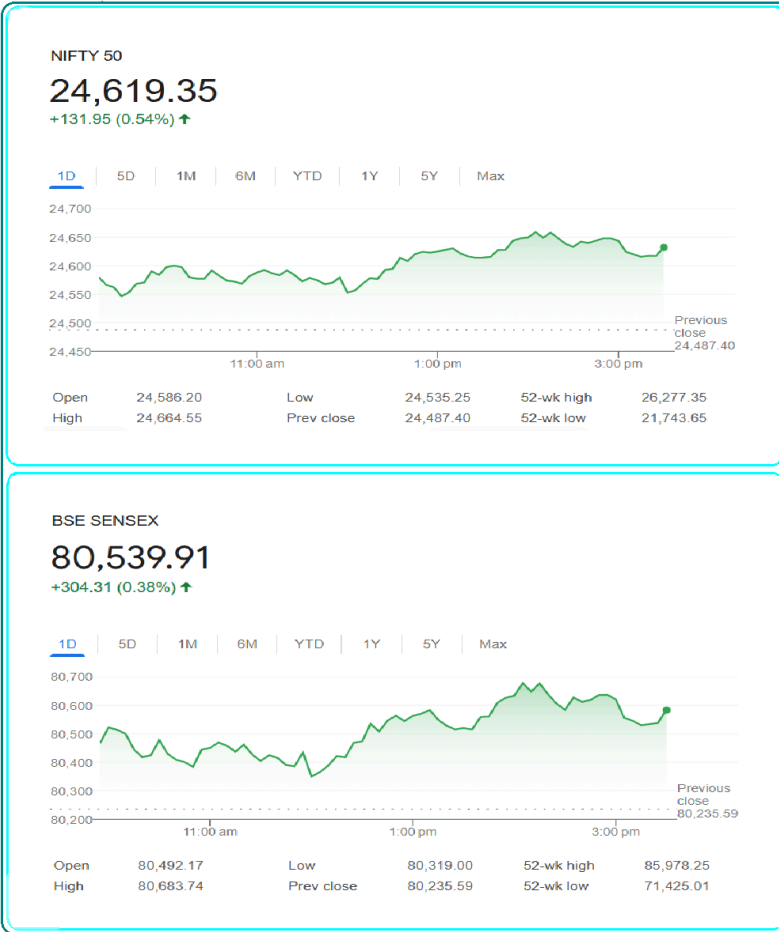


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24619.35	24487.40	0.54%
S&P BSE SENSEX	80539.91	80235.59	0.38%
NIFTY MID100	56681.50	56324.85	0.63%
NIFTY SML100	17613.95	17498.10	0.66%

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

Market Wrap Up

- The domestic equity barometers ended with moderate gains today, supported by positive global cues. Upbeat domestic CPI data further boosted market sentiment. Investors will keep an eye on the ongoing earnings season, FII activity and key macroeconomic releases due later this week. The Nifty closed above the 24,600 level.
- The S&P BSE Sensex advanced 304.32 points or 0.38% to 80,539.91. The Nifty 50 index jumped 131.95 points or 0.54% to 24,619.35.
- The S&P BSE Mid-Cap index rose 0.56% and the S&P BSE Small-Cap index rose 0.58%.
- Among the sectoral indices, the Nifty Healthcare services index (up 2.13%), the Nifty Pharma index (up 1.73%) and the Nifty Metal index (up 1.26%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty PSU Bank index (down 0.14%), the Nifty Oil & Gas index (down 0.05%) and the Nifty FMCG index (down 0.04%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **August** series futures witnessed an unwinding of **long** position build up. Open Interest has been decreased by **196** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **BAJFINANCE**, **INFY**.
- Short** position build up for the **August** series has been witnessed in **WIPRO**, **TECHM**, **ITC**.
- Unwinding** position for the **August** series has been witnessed in **HDFCAMC**, **IOC**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55181.45	55043.70	0.25%
NIFTY AUTO	24122.65	23856.60	1.12%
NIFTY FMCG	55010.15	55034.45	-0.04%
NIFTY IT	34692.95	34674.30	0.05%
NIFTY METAL	9345.95	9229.70	1.26%
NIFTY PHARMA	22130.30	21753.50	1.73%
NIFTY REALTY	886.05	883.90	0.24%
BSE CG	67133.03	66460.66	1.01%
BSE CD	58579.17	58461.24	0.20%
BSE Oil & GAS	26334.51	26342.44	-0.03%
BSE POWER	6644.83	6644.27	0.01%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	43274.67	42718.17	1.30%
HANG SENG	25613.67	24969.68	2.58%
STRAITS TIMES	4272.76	4220.72	1.23%
SHANGHAI	3683.46	3665.92	0.48%
KOSPI	3224.37	3189.91	1.08%
JAKARTA	7892.91	7791.70	1.30%
TAIWAN	24370.02	24158.36	0.88%
KLSE COMPOSITE	1586.60	1567.90	1.19%
ALL ORDINARIES	9103.10	9150.30	-0.52%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	87454.46	79108.56
NSE F&O	146565.95	130795.38

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	3644.43

(Source: [NSE](#))

Corporate News

- Oil and Natural Gas Corporation** posted consolidated net sales at Rs 163,108.12 crore in June 2025 down 2.08% from Rs. 166,576.75 crore in June 2024. Net profit at Rs. 9,804.07 crore in June 2025 down 1.33% from Rs. 9,936.45 crore in June 2024.
- National Securities Depository** reported a net profit of Rs 89.63 crore for the first quarter of the financial year 2026. This marks a rise of more than 15% on-year from the Rs 77.82 crore reported by the newly-listed company for the same quarter last year. Revenue dropped 7.5% on-year to Rs 312 crore in Q1 FY26. Its revenue from operations stood at Rs 337 crore in Q1 FY25.
- Jindal Steel & Power** posted consolidated net sales at Rs 12,294.48 crore in June 2025 down 9.72% from Rs. 13,617.84 crore in June 2024. Net profit at Rs. 1,493.97 crore in June 2025 up 11.48% from Rs. 1,340.15 crore in June 2024.
- NMDC** reported a 32.65% increase in consolidated net profit to Rs 1,967.46 crore in Q1 FY26 as against Rs 1,483.18 crore reported in Q4 FY25. Revenue from operations declined 3.79% QoQ to Rs 6,738.86 crore in the quarter ended 30 June 2025.
- NHPC** reported consolidated net profit of Rs 1,065.02 crore in Q1 FY26, up 4.32% as against Rs 1,021.77 crore in Q1 FY25. Revenue from operations jumped 19.28% year on year (YoY) to Rs 3,213.77 crore in the quarter ended 30 June 2025.
- Apollo Hospitals Enterprise** reported 41.80% surge in consolidated net profit to Rs 432.80 crore on 14.87% increase in revenue from operations to Rs 5,842.10 crore in Q1 FY26 over Q1 FY25.
- Nykaa** reported a net profit of Rs 23.32 crore for the first quarter of the financial year 2026. This marks a whopping 142% on-year rise from the Rs 9.64 crore net profit reported in the corresponding quarter of the previous financial year. Revenue surged 23% on-year to Rs 2,155 crore in Q1 FY26, from Rs 1,746 crore in Q1 FY25.
- Suzlon Energy** posted consolidated net sales at Rs 3,131.72 crore in June 2025 up 54.91% from Rs. 2,021.59 crore in June 2024. Net profit at Rs. 324.32 crore in June

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
APOLLOHOSP	7808.50	7236.50	7.90%
HINDALCO	700.50	667.05	5.01%
DRREDDY	1253.40	1220.30	2.71%
HEROMOTOCO	4768.70	4645.20	2.66%
CIPLA	1561.00	1521.60	2.59%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INDUSINDBK	773.45	783.05	-1.23%
ADANIPTS	1319.60	1330.50	-0.82%
TITAN	3466.80	3486.80	-0.57%
ITC	414.10	416.35	-0.54%
ULTRACEMCO	12401.00	12449.00	-0.39%

(Source: [Moneycontrol](#))

- **Larsen & Toubro's** L&T Energy GreenTech Ltd. has partnered with ITOCHU Corp. of Japan to develop a green ammonia project in Kandla, Gujarat. The Joint Development Agreement aims to establish a 300 KTPA green ammonia facility. ITOCHU plans to utilize the produced ammonia for bunkering applications in Singapore, marking a significant step towards sustainable energy solutions.
- **Adani Digital Labs** has launched a suite of digital services, including a loyalty program called Adani Rewards, to enhance the travel experience at Adani-managed airports in India. The Adani OneApp now offers features like lounge booking, online ordering from airport outlets with gate delivery, and parking reservations.
- **Juniper Green Energy** has secured Rs 1,739 crore in debt financing from IREDA to support its renewable energy projects. This funding follows a successful USD 1 billion debt raise last year. Juniper Green Energy currently operates 1.45 GWp capacity and has commissioned projects ahead of schedule, demonstrating strong execution capabilities and commitment to India's energy goals.

2025 up 7.29% from Rs. 302.29 crore in June 2024.

- **Cochin Shipyard** reported a 7.8% rise in consolidated net profit to Rs 187.83 crore on a 38.5% increase in revenue from operations to Rs 1,068.59 crore in Q1 FY26 over Q1 FY25.
- **Karnataka Bank** reported standalone net profit declined 27% to Rs 292.40 crore on a 2.4% rise in total income to Rs 2,619.64 crore in Q1 FY26 over Q1 FY25. NII for the quarter was at Rs 755.60 crore, down 16.36% from Rs 903.36 crore posted in Q1 FY25.
- **Honasa Consumer** posted consolidated net profit rose 2.6% year-on-year to Rs 41 crore in Q1 FY26, supported by steady margins and higher sales. Revenue from operations increased 7.4% year-on-year to Rs 595 crore from Rs 554 crore in Q1 FY25.
- **Indowind Energy** posted consolidated net sales at Rs 11.54 crore in June 2025 up 111.54% from Rs. 5.46 crore in June 2024. Net profit at Rs. 2.29 crore in June 2025 up 42.68% from Rs. 1.61 crore in June 2024.
- **Tata Power** is significantly increasing its investments in renewable energy, which has become a major driver of revenue and profit growth. The company plans to add 1.7 GW of renewable capacity by the end of the fiscal year, bringing its total to approximately 6.6 GW.
- **ACME Solar Holdings** announced that its wholly owned subsidiary, ACME Hybrid Urja has secured Rs 3,184 crore in long-term financing from REC for a 280 MW Firm & Dispatchable Renewable Energy (FDRE) project contracted with NHPC.
- **Reliance Infrastructure** has secured an arbitration award of Rs 526 crore against Aravali Power Company Ltd. This favorable outcome stems from the arbitral tribunal's decision, which deemed the termination of their contract invalid. The award covers consequential claims, marking a significant victory for Reliance Infra following the 2018 dispute.

- **Indoco Remedies** announced it had received final approval from the USFDA for its ANDA for Rivaroxaban tablets USP.
- **One 97 Communications** said its wholly-owned subsidiary, Paytm Payments Services Limited (PPSL), received in-principle authorisation from the Reserve Bank of India (RBI) to operate as an online payment aggregator.
- **Shakti Pumps India** received a letter of empanelment from Maharashtra State Electricity Distribution Company (MSEDCL) for the supply of 34,720 standalone off-grid DC solar photovoltaic water pumping systems.
- **Central Bank of India** announced that it has received an approval from Reserve Bank of India (RBI) to setup an IFSC Banking Unit (IBU) in GIFT City, Gandhinagar, Gujarat.

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

Global News

- U.S. consumer price index rose by 0.2% in July after climbing by 0.3% in June. The annual rate of growth by consumer prices in July was unchanged from the previous month at 2.7%. Core consumer prices climbed by 0.3% in July after rising by 0.2% in June. The annual rate of growth by core consumer prices accelerated to 3.1% in July from 2.9% in June.
- U.S. government posted a \$291 billion budget deficit in July 2025, despite a \$21 billion.
- Germany's current account surplus widened to EUR 18.6 billion in June 2025 from EUR 7.5 billion in the previous month.
- Germany's annual inflation rate held at 2% in July 2025, unchanged from June. Monthly, the CPI 0.3% after stalling in June.
- Germany's wholesale prices rose 0.5% year-on-year in July 2025, easing from a 0.9% gain in June. On a monthly basis, wholesale prices slipped 0.1%, reversing June's gain.
- Japan producer prices rose 2.6% yoy in July 2025, slowing from a 2.9% growth in the prior month. On a monthly basis, producer prices increased 0.2%, after a downwardly revised 0.1% decline in June.

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

Economic News

- Crude Oil traded at US\$ 62.92/bbl (IST 17:00).
- INR strengthened to Rs. 87.45 from Rs. 87.71 against each US\$ resulting in daily change of 0.30%.
- India and China are mending economic ties after a 2020 border clash, spurred by rising trade tensions with the US under American President Donald Trump, who imposed tariffs on Indian goods. Modi is strengthening ties with BRICS nations like Brazil and Russia, seeking strategic autonomy amid US trade actions.

- India's net collection of direct taxes so far this fiscal year fell nearly 4% from a year earlier. Direct tax collections net of refunds fell to Rs. 6.64 lakh crore between April and August 11 from Rs. 6.91 lakh crore a year earlier.
- All India Sugar Trade Association asked the government to change sugar export quota rules. AISTA wants quotas only for mills that export directly. The current system lets some mills sell quotas, hindering exports. AISTA also criticised the ethanol export duty. They say it hurts mills without distilleries and farmer payments. India exported 6.44 lakh tonnes of sugar this year.
- Mergers and acquisitions experienced a 17% decrease, totaling USD 50 billion in the first half of 2025 compared to the previous year. Despite global economic challenges, deal value saw a slight increase from the latter half of 2024.

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

Forthcoming Events

Board Meetings as on 14/08/2025

Ashok Leyland Limited	Financial Results
Glenmark Pharmaceuticals Limited	Financial Results
Amara Raja Energy & Mobility Limited	Financial Results
AstraZeneca Pharma India Limited	Financial Results
Ahluwalia Contracts (India) Limited	Financial Results
Alkyl Amines Chemicals Limited	Financial Results
Asian Hotels (East) Limited	Financial Results
B. L. Kashyap and Sons Limited	Financial Results
BGR Energy Systems Limited	Financial Results
Coffee Day Enterprises Limited	Financial Results
Deepak Builders & Engineers India Limited	Financial Results
Easy Trip Planners Limited	Financial Results
Ethos Limited	Financial Results
Hemisphere Properties India Limited	Financial Results
Hindustan Copper Limited	Financial Results
Hindustan Oil Exploration Company Limited	Financial Results
Indian Oil Corporation Limited	Financial Results
Inox Wind Limited	Financial Results
IRB Infrastructure Developers Limited	Financial Results/Dividend
Jai Corp Limited	Financial Results
Jindal Poly Films Limited	Financial Results
Kernex Microsystems (India) Limited	Financial Results
Keynote Financial Services Limited	Financial Results
La Opala RG Limited	Financial Results
Lovable Lingerie Limited	Financial Results
MBL Infrastructure Limited	Financial Results

McLeod Russel India Limited	Financial Results/Voluntary Delisting
Nagarjuna Fertilizers and Chemicals Limited	Financial Results
National Fertilizers Limited	Financial Results/Dividend
Nectar Lifesciences Limited	Financial Results
Patanjali Foods Limited	Financial Results
Popular Vehicles and Services Limited	Financial Results
Prakash Pipes Limited	Financial Results
Redtape Limited	Financial Results
SEL Manufacturing Company Limited	Financial Results
Signpost India Limited	Financial Results
SIL Investments Limited	Financial Results
Spandana Sphoorty Financial Limited	Financial Results
Sreeleathers Limited	Financial Results
Sri Adhikari Brothers Television Network Limited	Financial Results
Superhouse Limited	Financial Results
Thirumalai Chemicals Limited	Financial Results
TruCap Finance Limited	Financial Results
Udayshivakumar Infra Limited	Financial Results
Vodafone Idea Limited	Financial Results
Walchandnagar Industries Limited	Financial Results
Western Carriers (India) Limited	Financial Results
Zaggle Prepaid Ocean Services Limited	Financial Results

(Source: NSE)

Corporate Actions as on 14/08/2025

Action Construction Equipment Limited	Dividend - Rs 2 Per Share
Alkali Metals Limited	Dividend - Re 0.50 Per Share
Anuh Pharma Limited	Dividend - Rs 1.50 Per Share
Astral Limited	Dividend - Rs 2.25 Per Share
Bandhan Bank Limited	Dividend - Rs 1.50 Per Share
Bhagiradha Chemicals & Industries Limited	Dividend - Rs 0.15 Per Share
Bharat Electronics Limited	Dividend - Rs 0.90 Per Share
Denta Water and Infra Solutions Limited	Dividend - Rs 2.50 Per Share
Electrosteel Castings Limited	Dividend - Rs 1.40 Per Share
Emcure Pharmaceuticals Limited	Dividend - Rs 3 Per Share
Everest Kanto Cylinder Limited	Dividend - Rs 0.70 Per Share
Excel Industries Limited	Dividend - Rs 13.75 Per Share
Five-Star Business Finance Limited	Dividend - Rs 2 Per Share
Gland Pharma Limited	Dividend - Rs 18 Per Share
Godawari Power And Ispat limited	Dividend - Re 1 Per Share

Hindustan Petroleum Corporation Limited	Dividend - Rs 10.50 Per Share
Housing & Urban Development Corporation Limited	Interim Dividend - Rs 1.15 Per Share
International Gemmological Institute (India) Limited	Interim Dividend - Rs 2.50 Per Share
Jindal Drilling And Industries Limited	Dividend - Re 1 Per Share
LG Balakrishnan & Bros Limited	Dividend - Rs 20 Per Share
Lloyds Enterprises Limited	Rights 1:5 @ Premium Rs 38/-
Mahanagar Gas Limited	Dividend - Rs 18 Per Share
Maharashtra Seamless Limited	Dividend - Rs 10 Per Sh
Manappuram Finance Limited	Interim Dividend - Rs 0.50 Per Share
Mangalam Cement Limited	Dividend - Rs 1.50 Per Share
Mangalore Chemicals & Fertilizers Limited	Dividend - Rs 1.50 Per Share
Minda Corporation Limited	Dividend - Rs 0.90 Per Share
Munjal Auto Industries Limited	Dividend - Re 1 Per Sh
Murudeshwar Ceramics Limited	Dividend - Rs 0.50 Per Share
N. B. I. Industrial Finance Company Limited	Dividend - Re 0.50 Per Share
Nath Bio-Genes (India) Limited	Dividend - Rs 2 Per Share
NCC Limited	Dividend - Rs 2.20 Per Share
NHPC Limited	Dividend - Rs 0.51 Per Share
REC Limited	Interim Dividend - Rs 4.60 Per Share
Reliance Industries Limited	Dividend - Rs 5.5 Per Share
Repco Home Finance Limited	Dividend - Rs 4 Per Share
Rossell India Limited	Dividend - Re 0.40 Per Share
Sahyadri Industries Limited	Dividend - Re 1 Per Share
Star Cement Limited	Interim Dividend - Re 1 Per Share
Tourism Finance Corporation of India Limited	Dividend - Rs 3 Per Share
Uniparts India Limited	Interim Dividend - Rs 8.25 Per Share
Vaibhav Global Limited	Interim Dividend - Rs 1.50 Per Share
Venky's (India) Limited	Dividend - Rs 10 Per Share
VRL Logistics Limited	Bonus 1:1
West Coast Paper Mills Limited	Dividend - Rs 5 Per Share
Zen Technologies Limited	Dividend - Rs 2 Per Share

(Source: NSE)

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