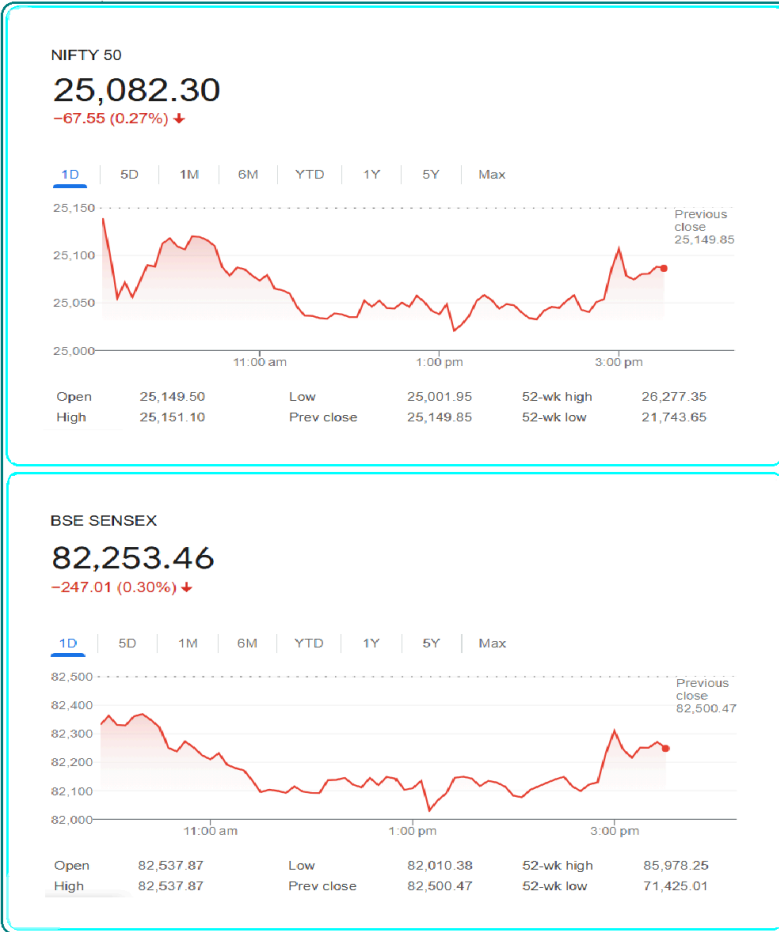


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25082.30	25149.85	-0.27%
S&P BSE SENSEX	82253.46	82500.47	-0.30%
NIFTY MID100	59052.55	58642.20	0.70%
NIFTY SML100	18954.95	18763.45	1.02%

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

Market Wrap Up

- The key equity barometers ended with modest cuts today, extending their decline for the fourth consecutive session, despite favorable domestic data. Investors will monitor a slew of upcoming economic indicators, foreign capital flow, the tariff situation, and quarterly earnings from companies this week. The Nifty settled below the 25,100 level.
- The S&P BSE Sensex declined 247.01 points or 0.30% to 82,253.46. The Nifty 50 index lost 67.55 points or 0.27% to 25,082.30. In the past four consecutive trading sessions, the Sensex and the Nifty dropped 1.74% and 1.72%, respectively.
- The S&P BSE Mid-Cap index rose 0.67% and the S&P BSE Small-Cap index added 0.57%.
- Among the sectoral indices, the Nifty Realty index (up 1.39%), the Nifty Media index (up 1.36%) and the Nifty Healthcare index (up 1%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 1.11%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **July** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **13559** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **BHARTIARTL, SBIN, ICICIBANK, ITC**.
- Short** position build up for the **July** series has been witnessed in **RELIANCE, HDFCBANK, INFY, BAJFINANCE**.
- Unwinding** position for the **July** series has been witnessed in **LT, BHEL, VEDL, TRENT**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56765.35	56754.70	0.02%
NIFTY AUTO	23552.00	23493.80	0.25%
NIFTY FMCG	56025.60	55910.25	0.21%
NIFTY IT	37273.70	37693.25	-1.11%
NIFTY METAL	9407.95	9382.85	0.27%
NIFTY PHARMA	22410.35	22225.90	0.83%
NIFTY REALTY	976.25	962.90	1.39%
BSE CG	70916.10	70967.04	-0.07%
BSE CD	59700.65	59491.08	0.35%
BSE Oil & GAS	27853.26	27802.96	0.18%
BSE POWER	6906.58	6890.22	0.24%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39459.62	39569.68	-0.28%
HANG SENG	24203.32	24139.57	0.26%
STRAITS TIMES	4109.21	4087.81	0.52%
SHANGHAI	3519.65	3510.18	0.27%
KOSPI	3202.03	3175.77	0.83%
JAKARTA	7097.15	7047.44	0.71%
TAIWAN	22614.97	22751.03	-0.60%
KLSE COMPOSITE	1537.51	1536.07	0.09%
ALL ORDINARIES	8815.30	8820.30	-0.06%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	99597.77	97900.73
NSE F&O	132608.30	140285.65

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1614.32

(Source: [NSE](#))

Corporate News

- DMart** posted consolidated net profit stood at Rs 773 crore, down 0.1% from Rs 774 crore in the year-ago period. The muted bottom-line performance came despite a 16.3% year-on-year increase in revenue, which rose to Rs 16,359.7 crore from Rs 14,069 crore in Q1FY25.
- Ola Electric Mobility** posted consolidated net sales at Rs 828.00 crore in June 2025 down 49.64% from Rs. 1,644.00 crore in June 2024. Net loss at Rs. 428.00 crore in June 2025 down 23.34% from Rs. 347.00 crore in June 2024.
- Sula Vineyards** reported consolidated net profit fell 3.84% to Rs 13.03 crore in Q4 FY25 as against Rs 13.55 crore posted in Q4 FY24. Revenue from operations (excluding excise duty) rose 2.6% YoY to Rs 125.71 crore during the quarter.
- Kolte-Patil Developers** has reported a 13.3% decline in sales value to Rs 616 crore in the first quarter of FY26, down from Rs 711 crore recorded in the same quarter last year. Sales volume fell 12.5% to 0.84 million square feet in Q1 FY26 compared to 0.96 million square feet in Q1 FY25.
- Kesoram Industries** reported consolidated net loss of Rs 99.34 crore in the quarter ended June 2025 as against net loss of Rs 61.37 crore during the previous quarter ended June 2024. Sales declined 9.26% to Rs 61.05 crore in the quarter ended June 2025 as against Rs 67.28 crore during the previous quarter ended June 2024.
- TCS** navigates global economic uncertainty with delayed client decisions and cautious spending on long-term projects. CEO Krithivasan anticipates revenue growth in FY26 if trade negotiations conclude and customer confidence rebounds by late summer. The company is focusing on AI-driven productivity gains and transparently sharing benefits with clients while addressing concerns about employee assignments and bench time.
- Hero MotoCorp** is gearing up for a significant global expansion, with plans to enter Germany, France, Spain, and the UK in the second quarter of FY 2025-26. The company is also fostering innovation by mentoring entrepreneurs and investing in electric vehicle ventures like Ather Energy and Euler Motors, aiming to lead India's

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ETERNAL	270.60	263.35	2.75%
TITAN	3404.70	3361.60	1.28%
INDUSINDBK	867.60	858.85	1.02%
ONGC	244.22	241.76	1.02%
ADANIET	2581.30	2558.70	0.88%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
JIOFIN	319.10	325.80	-2.06%
TECHM	1576.70	1602.50	-1.61%
WIPRO	254.25	258.30	-1.57%
BAJFINANCE	918.85	933.50	-1.57%
INFY	1570.30	1594.90	-1.54%

(Source: [Moneycontrol](#))

- **Castrol India** has won a Rs 4,131 crore MVAT tax case against the Maharashtra Sales Tax Department. The company disclosed that the Customs, Excise & Service Tax Appellate Tribunal (CESTAT) on 11 November 2025 ruled in favour of Castrol India, rejecting MSTD's appeals for the assessment years 2007-08 to 2015-16 and for 2017-18.
- **VIP Industries** announced that Dilip Piramal and Family (promoters) have entered into a definitive agreement with the Multiples Consortium to sell up to 32% stake in the company. A consortium led by Multiples Alternate Asset Management and Samvibhag Securities has signed an agreement to acquire nearly 4.55 crore shares or 31.89% stake in the company from the Piramal family. The deal includes CaratLane's founder Mithun Sacheti. The shares have been acquired by the buyers for a total consideration of Rs 1,763.31 crore.
- **ITES** announced that it has received an order for undertaking the construction and renovation of Government First Grade College at various locations in Karnataka under the PM USHA Scheme.

electric mobility transformation.

- **Cipla** is set to enter India's weight management market, addressing the increasing demand for obesity solutions, while also strengthening its central nervous system portfolio through strategic in-licensing deals and acquisitions, particularly in ADHD and Parkinson's disease. The company is also focusing on innovation-led solutions to combat antimicrobial resistance and aims to be a global, patient-centric healthcare leader.
- **Glenmark Pharmaceuticals** has announced that it received a warning letter from the U.S. Food and Drug Administration (FDA) for its manufacturing facility in Indore, Madhya Pradesh, India.
- **Gland Pharma** said that its Pashamylaram facility has secured GMP certification from the Danish Medicines Agency. The approval covers aseptic powder formulations for injection, infusion, and inhalation. This shall cover markets outside the European Economic Area.
- **NCC Limited** has received a major contract worth Rs. 2,269 Crore (excluding GST). The business received this order from the Mumbai Metropolitan Region Development Authority. The order is for construction of Mumbai Metro Line 6 - Package 1-CA-232.
- **Ahluwalia Contracts (India)** announced that it has secured an order worth Rs 2,089 crore from DLF.
- **Housing & Urban Development Corporation** announced that it has signed a memorandum of understanding (MoU) with Madhya Pradesh Urban Development Company (MPUDCL) in Indore.
- **Elecon Engineering Company** posted consolidated net sales at Rs 490.57 crore in June 2025 up 25.03% from Rs. 392.36 crore in June 2024. Net profit at Rs. 175.44 crore in June 2025 up 139.15% from Rs. 73.36 crore in June 2024.
- **Dynacons Systems & Solutions** secured software defined wide area network (SD-WAN) solution contract from State Bank of India worth Rs 62.98 crore.

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

Global News

- China's trade surplus widened significantly to USD 114.77 billion in June 2025, up from USD 98.94 billion in the same period a year earlier. Exports increased by 5.8% yoy to a four-month high of USD 325.2 billion in June 2025, accelerating from 4.8% growth in May while imports rose 1.1% yoy to USD 210.4 billion in June 2025, rebounding from a 3.4% fall in May and marking the first monthly increase this year.
- Chinese banks issued CNY 2.24 trillion in new yuan loans in June 2025, the highest in three months, up from CNY 620 billion in May. Total social financing rose by CNY 4.2 trillion, up from CNY 2.29 trillion in May and CNY 3.3 trillion a year earlier. Meanwhile, outstanding loan growth held steady at 7.1%. M2 money supply growth also picked up, rising to 8.3% from 7.9% in May.
- U.S. government reported a \$27 billion budget surplus in June, driven by a sharp rise in customs duties revenue, which hit a record \$27.2 billion.
- Germany recorded a Current Account surplus of 9587.04 EUR Million in May of 2025.
- Japan's industrial production fell 0.1% month-over-month in May 2025, defying flash estimates of a 0.5% increase and following a 1.1% decline in April. On a year-on-year basis, industrial output contracted 2.4%, reversing a 0.5% rise in April and marking the first annual decline in five months.
- Japan's core machinery orders fell 0.6% month-over-month to Yen 913.5 billion in May 2025. Year-over-year, private-sector machinery orders increased 4.4% in May, down from April's 6.6% gain.

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

Economic News

- Crude Oil traded at US\$ 69.52/bbl (IST 17:00).
- INR weakened to Rs. 85.98 from Rs. 85.79 against each US\$ resulting in daily change of 0.22%.
- India's consumer price inflation eased for the eighth straight month, falling to 2.1% in June 2025, down from 2.82% in May. On a monthly basis, consumer prices rose 0.62% compared to May.
- India's wholesale prices unexpectedly fell by 0.13% yoy in June 2025, reversing from 0.39% growth in May. Monthly, wholesale prices dropped by 0.19%, after a 0.06% fall in May.
- The income-tax department has issued Rs. 4.76 lakh crore in refunds in FY25, a staggering increase from Rs. 83,008 crore in FY14. This 474% surge in 11 years outpaces the 274% growth recorded in gross direct tax collections, which rose to Rs. 27 lakh crore in FY25 from Rs. 7.2 lakh crore in FY14.
- India's crude oil imports from Russia surged to a near-annual high in June, reaching 2.08 million bpd, driven by West Asia tensions and discounted prices. While overall imports decreased, Russian volumes increased, with three refineries processing over half for G7+ exports. Despite diversification efforts, Russia remains India's top supplier, accounting for

40% of total crude imports.

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

Forthcoming Events

Board Meetings as on 15/07/2025

ICICI Lombard General Insurance Company Limited	Financial Results
ICICI Prudential Life Insurance Company Limited	Financial Results
GM Breweries Limited	Financial Results
Hathway Cable & Datacom Limited	Financial Results
HDB Financial Services Limited	Financial Results
Geojit Financial Services Limited	Financial Results
Himadri Speciality Chemical Limited	Financial Results
Bank of Maharashtra	Financial Results
Just Dial Limited	Financial Results
Network18 Media & Investments Limited	Financial Results
Nureca Limited	Financial Results
Swaraj Engines Limited	Financial Results
Allcargo Terminals Limited	Fund Raising
Anupam Rasayan India Limited	Dividend
Centrum Capital Limited	Fund Raising
Jtekt India Limited	Fund Raising
Plastiblends India Limited	Financial Results
Spandana Sphoorty Financial Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 15/07/2025

Aditya Birla Real Estate Limited	Dividend - Rs 2 Per Share
Anuh Pharma Limited	Bonus 1:1
Computer Age Management Services Limited	Dividend - Rs 19 Per Share
Grindwell Norton Limited	Dividend - Rs 17 Per Share
IDBI Bank Limited	Dividend - Rs 2.10 Per Share
Kirloskar Pneumatic Company Limited	Dividend - Rs 6.50 Per Share
Mahindra & Mahindra Financial Services Limited	Dividend - Rs 6.50 Per Share
Vinyl Chemicals (India) Limited	Dividend - Rs 7 Per Share

(Source: NSE)

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