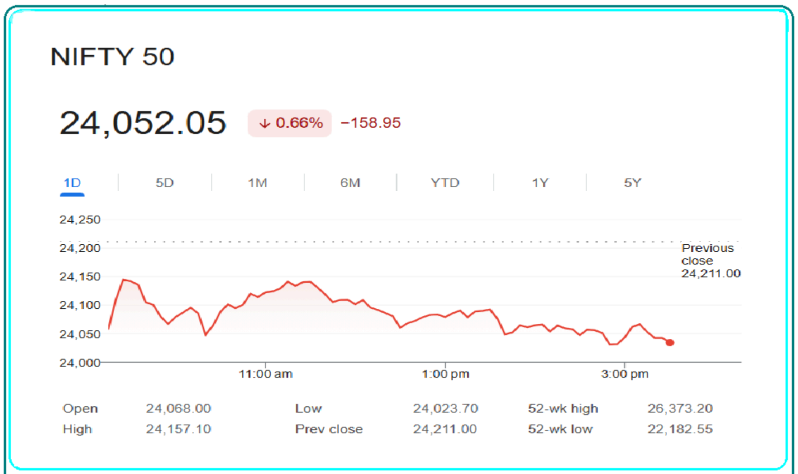
SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY DAILY REPORT

14th July 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24052.05	24211.00	**-0.66%**
S&P BSE SENSEX	77054.94	77616.40	**-0.72%**
NIFTY MID100	62766.40	63040.95	**-0.44%**
NIFTY SML100	19227.35	19422.95	**-1.01%**

(Source: NSE, BSE)

Market Wrap Up

- The headline equity benchmark ended with significant losses, as investors remained wary of escalating geopolitical tensions following the US-Iran conflict. Fears of higher crude oil prices and mounting inflationary pressures dampened sentiment, pushing the Nifty below the 24,100 level.
- The S&P BSE Sensex declined 561.46 points or 0.72% to 77,054.94. The Nifty 50 index fell 158.95 points or 0.66% to 24,052.05. In the past three consecutive trading sessions, the Nifty has lost 1.38%, while the Sensex has fallen 1.45%.
- The BSE 150 MidCap Index fell 0.54% and the BSE 250 SmallCap Index dropped 1.08%.
- Among the sectoral indices, the Nifty Pharma index (up 1.03%), the Nifty Healthcare index (up 0.89%) and the Nifty Metal index (up 0.61%) outperformed the Nifty 50 index.
- Meanwhile the Nifty Realty index (down 1.97%), the Nifty PSU Bank index (down 1.80%) and the Nifty Auto index (down 1.61%) 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 **1642** contracts at the end of the day.
- **Long** position build up for the **July** series has been witnessed in **BHARTIARTL**, **ICICIGI**, **BIOCON**.
- **Short** position build up for the **July** series has been witnessed in **RELIANCE**, **LT**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- **Unwinding** position for the **July** series has been witnessed in **ADANIGREEN**, **GRASIM**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57462.30	58131.45	-1.15%
NIFTY AUTO	26547.50	26981.50	-1.61%
NIFTY FMCG	48524.95	48809.90	-0.58%
NIFTY IT	28724.75	29015.85	-1.00%
NIFTY METAL	12677.70	12601.45	0.61%
NIFTY PHARMA	25907.10	25643.35	1.03%
NIFTY REALTY	918.65	937.15	-1.97%
BSE CG	77054.94	78453.75	-1.78%
BSE CD	62245.06	62366.89	-0.20%
BSE Oil & GAS	26171.92	26323.51	-0.58%
BSE POWER	7856.67	7826.83	0.38%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	67743.50	67242.73	0.74%
HANG SENG	24340.73	24213.72	0.52%
STRAITS TIMES	5495.61	5470.34	0.46%
SHANGHAI	3967.13	3913.79	1.36%
KOSPI	6856.83	6806.93	0.73%
JAKARTA	6039.52	6037.84	0.03%
TAIWAN	44737.95	45380.52	-1.42%
KLSE COMPOSITE	1719.94	1698.44	1.27%
All ORDINARIES	9001.30	9003.00	-0.02%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	120723.96	121684.26
NSE F&O	171125.00	153583.14

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	739.69

(Source: NSE)

Corporate News

- **HCL Technologies** reported consolidated net profit increased 20.3% year-on-year and 3.0% quarter-on-quarter to Rs 4,624 crore in Q1 FY27. Revenue from operations rose 13.9% YoY and 1.8% QoQ to Rs 34,579 crore.

- **ICICI Prudential Asset Management Company** reported net profit rose 23.10% YoY and 25.45% QoQ to Rs 964.63 crore in Q1 FY27. Total income increased 18.10% YoY and 20.18% QoQ to Rs 1,745.02 crore in the June 2026 quarter.

- **Kernex Microsystems (India)** announced that Integral Coach Factory, Chennai has awarded an order valued at Rs. 100.53 crore to the company for the supply, installation, interfacing with Electrics of Trainset, testing and commissioning of On-board KAVACH Equipment as per ROSO Specification No. ROSOISPNIJ 9612020, Version 4.0 or latest Trainset (Including Warranty and CAMC).

- **PDS** announced that it had secured a multi-year Sourcing as a Service (SaaS) contract with the global sourcing arm of a leading French-headquartered supermarket group.

- **EMS** has emerged as the lowest bidder (L-1) for a sewerage project awarded by UP Jal Nigam (Urban), Varanasi, with an estimated order value of Rs 105.82 crore.

- **Welspun Corp** announced the receipt of fresh large orders for supply of pipes for Oil & Gas export projects, from its India facility, cumulatively valued at approximately Rs 1,400 crore.

- **H.G. Infra Engineering** has been declared as the L-1 bidder by the Department of Skill, Employment & Entrepreneurship, Government of Rajasthan, for the upgradation of Industrial Training Institutes (ITIs).

- **Powerica** has emerged as the winning bidder in the e-reverse auction conducted by Gujarat Urja Vikas Nigam (GUVNL) for the procurement of power from 250 MW grid-connected wind power projects. The company secured a 50 MW project.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BHARTIARTL	1936.50	1901.80	**1.82%**
APOLLOHOSP	8900.50	8782.50	**1.34%**
SUNPHARMA	1942.60	1921.40	**1.10%**
DRREDDY	1246.20	1234.50	**0.95%**
TCS	2200.60	2181.50	**0.88%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1166.70	1221.20	**-4.46%**
SHRIRAMFIN	1013.90	1048.10	**-3.26%**
HDFCLIFE	555.20	573.40	**-3.17%**
TMPV	333.35	342.25	**-2.60%**
INDIGO	5108.00	5229.50	**-2.32%**

(Source: Moneycontrol)

- **Captain Polyplast** has secured a Rs 23.6 crore order from the Maharashtra State Electricity Distribution Company (MSEDCL) for the supply and installation of 1,000 Off-Grid DC Solar Photovoltaic Water Pumping Systems under the PM Kusum-B Scheme.

- **NBCC (India)** has secured multiple orders worth a total of Rs 501.45 crore from various government entities, strengthening its order book across education and infrastructure projects. The largest order, valued at Rs 430.69 crore, has been awarded by the Rajasthan Council of School Education for the turnkey construction of 2,256 science laboratories for physics, chemistry and biology in 922 government schools across Rajasthan.

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

Global News

- China's trade surplus widened to USD 125.62 billion in June 2026 from USD 113.89 billion in the same period of 2025. Export growth accelerated to 27.0% year-on-year, reaching a record high of USD 412.39 billion, up from May's 19.4% growth while imports surged 36.0% yoy to a record high of USD 286.76 billion, accelerating from a 27.4% jump in May.

- U.S. federal budget posted a deficit of $120.31 billion in June, narrowing from the $239 billion deficit in May.

- Germany's current account surplus reached EUR 10.4 billion in May 2026, the smallest in a year but still above the EUR 5.9 billion recorded in May 2025.

- Germany's wholesale prices rose 4.9% year-on-year in June 2026, easing from a 5.9% increase in May. On a monthly basis, wholesale prices fell 0.7% in June, following a 0.6% decline in May.

- Japan's industrial production edged up 0.1% month-over-month in May 2026, easing from April's 0.5% increase. On an annual basis, industrial output declined 2.1%, reversing a 2.0% rise in April.

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

Economic News

- Crude Oil traded at US$ 80.26/bbl (IST 17:00).
- INR weakened to Rs. 96.21 from Rs. 95.63 against each US$ resulting in daily change of 0.61%.
- India's wholesale prices increased 9.87% year-on-year in June 2026.
- The India-UK Comprehensive Economic and Trade Agreement takes effect on July 15, 2026. This pact grants nearly 99% duty-free access for Indian exports to the United Kingdom. Labour-intensive sectors like textiles and footwear will see significant export gains. India will also reduce tariffs on several British products, including alcoholic beverages. The agreement opens India's government procurement market to UK suppliers for the first time.
- India's capital expenditure is projected to rise significantly by FY2030. Private sector investment is expected to accelerate, driven by domestic demand and policy support. Central government spending will continue focusing on infrastructure and defence projects. Multiple investment drivers are anticipated to make the capex cycle more resilient. Gross foreign direct investment trends also indicate improving investment patterns.
- The domestic mining and construction equipment industry recorded gross total sales of more than 140,000 units in the last fiscal year.
- The US FDA approved an at-home starting dose for Eisai and Biogen's Alzheimer's drug. This new subcutaneous formulation allows patients to self-administer injections, improving access. Previously, patients received intravenous infusions, typically at clinics, for initial treatment. This approval differentiates Leqembi from competitor Kisunla's infusion-only requirement. The drug targets amyloid beta plaques in the brains of Alzheimer's patients.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 15/07/2026

HDB Financial Services Limited	Financial Results
HDFC Asset Management Company Limited	Financial Results
HDFC Life Insurance Company Limited	Financial Results
ICICI Lombard General Insurance Company Limited	Financial Results
Angel One Limited	Financial Results/Dividend
Union Bank of India	Financial Results
Billionbrains Garage Ventures Limited	Financial Results
Brigade Enterprises Limited	Fund Raising
Emmvee Photovoltaic Power Limited	Financial Results
Fedbank Financial Services Limited	Financial Results

Goa Carbon Limited	Financial Results
Agri-Tech (India) Limited	Financial Results
GTPL Hathway Limited	Financial Results
Himadri Speciality Chemical Limited	Financial Results
Jana Small Finance Bank Limited	Financial Results
Ksolves India Limited	Financial Results/Dividend
Mangalore Refinery and Petrochemicals Limited	Financial Results
Network18 Media & Investments Limited	Financial Results
Oriental Hotels Limited	Financial Results
Reliance Industrial Infrastructure Limited	Financial Results
Sai Silks (Kalamandir) Limited	Financial Results
Steel Strips Wheels Limited	Financial Results

(Source: NSE)

Corporate Actions as on 15/07/2026

Tata Consultancy Services Limited	Interim Dividend - Rs 12 Per Share
Bharat Bijlee Limited	Dividend - Rs 35 Per Share
Heritage Foods Limited	Dividend - Rs 2.50 Per Share
Kfin Technologies Limited	Dividend - Rs 12 Per Share
Orbit Exports Limited	Buy Back

(Source: NSE)

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