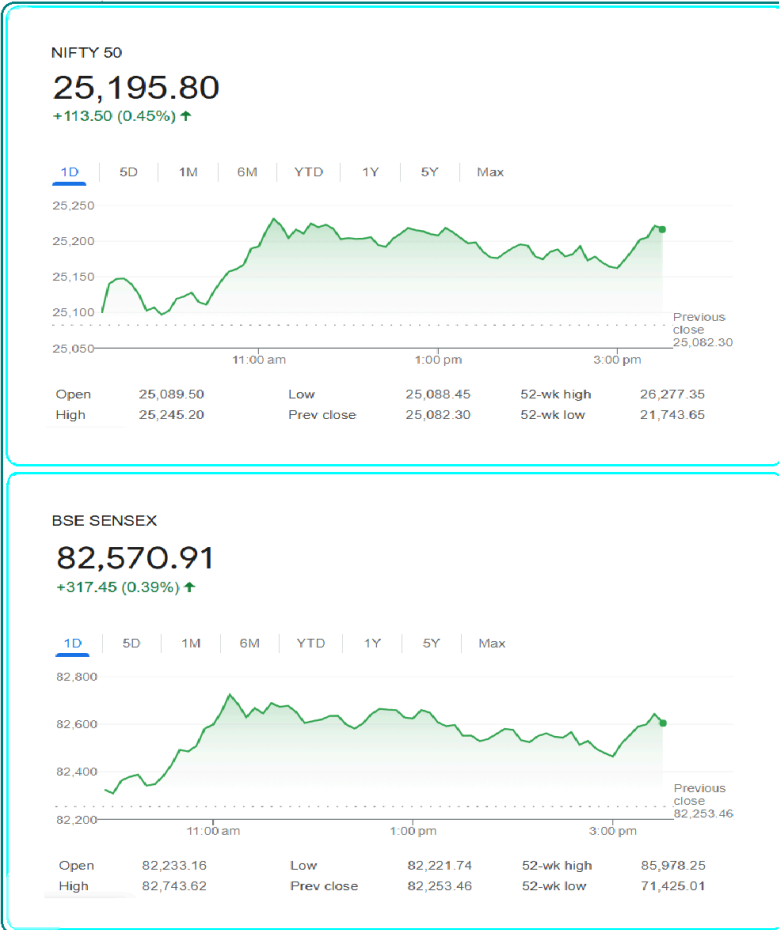


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25195.80	25082.30	0.45%
S&P BSE SENSEX	82570.91	82253.46	0.39%
NIFTY MID100	59612.65	59052.55	0.95%
NIFTY SML100	19135.25	18954.95	0.95%

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

Market Wrap Up

- The key equity benchmark ended with modest gains today, snapping a four-day losing streak, amid buying interest and encouraging domestic data. Investors will continue to monitor domestic macroeconomic indicators, global tariff-related cues, and corporate earnings announcements. The Nifty settled above the 25,150 mark.
- The S&P BSE Sensex jumped 317.45 points or 0.39% to 82,570.91. The Nifty 50 index added 113.50 points or 0.45% to 25,195.80.
- The S&P BSE Mid-Cap index rose 0.83% and the S&P BSE Small-Cap index added 0.95%.
- Among the sectoral indices, the Nifty Auto index (up 1.50%), the Nifty Healthcare index (up 1.23%) and the Nifty Pharma index (up 1.14%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (up 0.04%), the Nifty Private Bank index (up 0.13%) and the Nifty IT index (up 0.40%) 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 **1379** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **RELIANCE**, **LT**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- Short** position build up for the **July** series has been witnessed in **HCLTECH**, **ICICIPRULI**, **ICICIGI**, **HDFCLIFE**.
- Unwinding** position for the **July** series has been witnessed in **BHARTIARTL**, **BAJFINANCE**, **VEDL**, **ITC**, **TRENT**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57006.65	56765.35	0.43%
NIFTY AUTO	23905.25	23552.00	1.50%
NIFTY FMCG	56429.05	56025.60	0.72%
NIFTY IT	37424.60	37273.70	0.40%
NIFTY METAL	9411.95	9407.95	0.04%
NIFTY PHARMA	22665.70	22410.35	1.14%
NIFTY REALTY	983.95	976.25	0.79%
BSE CG	71408.93	70916.10	0.69%
BSE CD	60065.18	59700.65	0.61%
BSE Oil & GAS	27996.60	27853.26	0.51%
BSE POWER	6925.00	6906.58	0.27%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39678.02	39459.62	0.55%
HANG SENG	24590.12	24203.32	1.60%
STRAITS TIMES	4119.82	4109.21	0.26%
SHANGHAI	3505.00	3519.65	-0.42%
KOSPI	3215.28	3202.03	0.41%
JAKARTA	7140.47	7097.15	0.61%
TAIWAN	22835.94	22614.97	0.98%
KLSE COMPOSITE	1525.40	1537.51	-0.79%
ALL ORDINARIES	8875.30	8815.30	0.68%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	96302.03	99597.77
NSE F&O	130512.88	132608.30

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	120.47
NET SELL	-

(Source: [NSE](#))

Corporate News

- **HCL Technologies** posted consolidated net sales at Rs 30,349.00 crore in June 2025 up 8.17% from Rs. 28,057.00 crore in June 2024. Net profit at Rs. 3,843.00 crore in June 2025 down 9.73% from Rs. 4,257.00 crore in June 2024.
- **ICICI Prudential Life Insurance Company** reported a 34.2% year-on-year jump in net profit at Rs 302 crore for the June quarter, up from Rs 225 crore in year-ago period. The life insurer saw a marginal decline in its Value of New Business (VNB) to Rs 457 crore from Rs 472 crore in Q1 FY25. However, the VNB margin improved to 24.5% from 24%.
- **NELCO** posted consolidated net sales at Rs 74.79 crore in June 2025 up 0.96% from Rs. 74.08 crore in June 2024. Net profit at Rs. 1.80 crore in June 2025 down 60.53% from Rs. 4.56 crore in June 2024.
- **Tejas Networks** posted consolidated net sales at Rs 201.98 crore in June 2025 down 87.08% from Rs. 1,562.77 crore in June 2024. Net loss at Rs. 193.87 crore in June 2025 down 350.22% from Rs. 77.48 crore in June 2024.
- **Tata Technologies** posted consolidated net sales at Rs 1,244.29 crore in June 2025 down 1.94% from Rs. 1,268.97 crore in June 2024. Net profit at Rs. 170.28 crore in June 2025 up 5.09% from Rs. 162.03 crore in June 2024.
- **Den Networks** posted consolidated net sales at Rs 241.27 crore in June 2025 down 2.53% from Rs. 247.53 crore in June 2024. Net profit at Rs. 54.22 crore in June 2025 up 19.12% from Rs. 45.52 crore in June 2024.
- **Bank of Maharashtra** posted consolidated net profit rose 16.16% to Rs 1504.37 crore in the quarter ended June 2025 as against Rs 1295.09 crore during the previous quarter ended June 2024. Total Operating.
- **G M Breweries** posted net profit rose 3.69% to Rs 25.86 crore in the quarter ended June 2025 as against Rs 24.94 crore during the previous quarter ended June 2024. Sales rose 6.86% to Rs 162.86 crore in the quarter ended June 2025 as against Rs 152.40 crore during the previous quarter ended June 2024.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HEROMOTOCO	4454.00	4251.70	4.76%
BAJAJ-AUTO	8311.00	8087.50	2.76%
SUNPHARMA	1727.50	1682.60	2.67%
SHRIRAMFIN	684.45	669.75	2.19%
APOLLOHOSP	7360.50	7220.00	1.95%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1566.40	1619.80	-3.30%
ETERNAL	266.45	270.60	-1.53%
SBILIFE	1824.80	1851.30	-1.43%
HDFCLIFE	756.85	764.75	-1.03%
TATASTEEL	159.00	160.44	-0.90%

(Source: [Moneycontrol](#))

- **Rallis India** posted net profit surged 97.92% to Rs 95 on a 22.22% increase in revenue from operations to Rs 957 crore in Q1 FY26 over Q1 FY25.
- **GAIL (India) Limited** has solidified a long-term agreement with Vitol Asia to supply approximately 1 MMTPA of LNG for a decade, starting in 2026. This partnership aims to bolster GAIL's LNG portfolio amidst India's rising demand, now the world's fourth-largest importer.
- Lululemon Athletica, the popular athletic apparel retailer, is set to enter the Indian market in the second half of 2026 through a partnership with **Tata CLiQ**. This move includes opening its first store and establishing e-commerce presence on the luxury platform.
- **KPI Green Energy** has received the Letter of Intent (LOI) from Gujarat Urja Vikas Nigam (GUVNL) for the development of 150 MW grid connected Wind Power Projects. The Power Purchase Agreement (PPA) with GUVNL shall be executed upon obtaining the requisite approval from the Gujarat Electricity Regulatory Commission (GERC).
- **RailTel Corporation of India** secured an order worth Rs 264 crore from East Central Railway for the implementation of the Kavach system, the indigenous Train Collision Avoidance System (TCAS).
- **Rail Vikas Nigam** has received a letter of acceptance (LOA) from the Delhi Metro Rail Corporation for a project valued at Rs 447.42 crore.
- **Power Mech Projects Limited** announced that it received two operation and maintenance (O&M) contracts aggregating to Rs. 551.35 Crore (excluding taxes, duties, levies, cess, and GST).
- **Sun Pharmaceutical Industries** has reached a settlement agreement with Incyte Corporation concerning Leqselvi, a drug for severe hair loss, leading to the dismissal of pending litigation in the US. Incyte has granted Sun a non-exclusive license for oral deuruxolitinib for specific non-oncology indications, including alopecia areata, in the US.
- **Sun Pharma** has launched LEQSELVI (deuruxolitinib) 8 mg tablets in the US. The tablets will be used for the treatment of adults with severe alopecia areata.
- **Wockhardt** announced a strategic exit from the US generic pharmaceuticals business.
- **Deepak Fertilisers & Petrochemicals Corporation** entered into a long-term agreement with Petronet LNG (PLL) for the regasification of Liquefied Natural Gas (LNG).

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

Global News

- China's GDP grew by a seasonally adjusted 1.1% in Q2 2025, slowing slightly from a 1.2% increase in Q1. The economy expanded 5.2% yoy in Q2 2025, slowing from 5.4% in the prior two quarters.
- China's retail sales increased by 4.8% year-on-year in June 2025, slowing from over one-year high of 6.4%. On a monthly basis, retail activity slipped 0.16% in June 2025, from a 0.69% gain in the previous month.
- China's industrial production grew by 6.8% year-on-year in June 2025, accelerating from May's six-month low of a 5.8% increase. Monthly, industrial output increased by 0.5%.
- China's fixed-asset investment rose by 2.8% year-on-year in the first half of 2025. On a monthly basis, fixed-asset investment decreased by 0.1%.
- China's unemployment rate stood at 5.0% in June 2025, unchanged from the previous month.
- China's house prices declined by 3.2% year-on-year in June 2025, slowing from a 3.5% drop in the previous month. On a monthly basis, however, new home prices fell 0.3% in June, after a 0.2% decrease in May.
- Eurozone industrial production rose by 1.7% month-over-month in May 2025, reversing from a 2.2% fall in April. On an annual basis, industrial output growth accelerated to 3.7% in May from 0.2% in April.
- Eurozone ZEW Indicator of Economic Sentiment rose by 0.8 points from the prior month to 36.1 in July 2025. The current economic situation increased by 6.5 points to -24.2.
- German ZEW Indicator of Economic Sentiment increased for a third month to 52.7 in July 2025, compared to 47.5 in June. The ZEW current conditions improved to -59.5, compared to -72 in the previous month.

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

Economic News

- Crude Oil traded at US\$ 66.89/bbl (IST 17:00).
- INR strengthened to Rs. 85.81 from Rs. 85.98 against each US\$ resulting in daily change of 0.20%.
- India's trade deficit for June 2025 narrowed to \$18.78 billion, compared to \$21.88 billion in May. Exports growth remained flat at \$35.14 billion in June as against \$35.16 billion same month last year while India's imports declined by 3.71% to \$53.92 billion in June as against \$56 billion a year ago.
- India's automakers dispatched 312,849 units to dealers during the month, down 7.4% from 337,757 units a year earlier. For the April-June quarter, wholesale car sales slipped 1.4% year-on-year, touching a two-year low. The drop was steeper when compared sequentially, down 13% from the March quarter.
- Donald Trump warns of penalties for nations purchasing Russian oil. India and China, major buyers, face potential

impact. India's Russian oil imports surged post-Ukraine war. China's imports remained steady. Market reaction is currently muted. Alternative sources exist, but at higher costs. India relies heavily on oil imports, with Russia now a key supplier.

- India's gem and jewellery exports witnessed a 14.25% decline in June, totaling USD 1626.96 million, attributed to global economic uncertainties and geopolitical tensions. Cut and polished diamond exports fell sharply by 23.49%, impacted by reduced consumer spending and the rising popularity of lab-grown diamonds. However, gold jewellery exports saw a 5.

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

Forthcoming Events

Board Meetings as on 16/07/2025

Tech Mahindra Limited	Financial Results
Angel One Limited	Financial Results
ITC Hotels Limited	Financial Results
L&T Technology Services Limited	Financial Results
D.B.Corp Limited	Financial Results/Dividend
Heubach Colorants India Limited	Financial Results
Kalpataru Limited	Financial Results
Onward Technologies Limited	Financial Results
Oriental Hotels Limited	Financial Results
Reliance Industrial Infrastructure Limited	Financial Results
Reliance Infrastructure Limited	Fund Raising
Reliance Power Limited	Fund Raising
State Bank of India	Fund Raising
Tree House Education & Accessories Limited	Financial Results

(Source: NSE)

Corporate Actions as on 16/07/2025

Tata Consultancy Services Limited	Interim Dividend - Rs 11 Per Share
TCI Express Limited	Dividend - Rs 2 Per Share
Anant Raj Limited	Dividend - Re 0.73 Per Share
Ashok Leyland Limited	Bonus 1:1
Avadh Sugar & Energy Limited	Dividend - Rs 10 Per Share
Piramal Pharma Limited	Dividend - Re 0.14 Per Share

(Source: NSE)

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