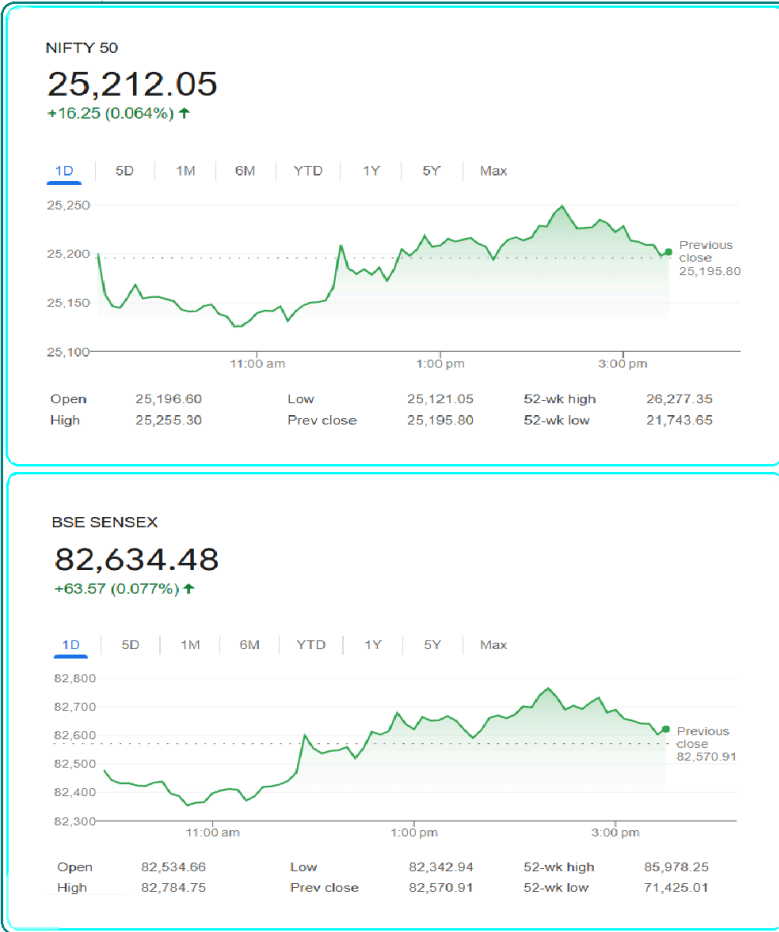


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25212.05	25195.80	0.06%
S&P BSE SENSEX	82634.48	82570.91	0.08%
NIFTY MID100	59620.65	59612.65	0.01%
NIFTY SML100	19140.05	19135.25	0.03%

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

Market Wrap Up

- The key equity benchmark ended with minor gains today, as investors remained cautious amid weak global cues and lingering uncertainty over trade tariffs. The Nifty settled above the 25,200 level.
- The S&P BSE Sensex jumped 63.57 points or 0.08% to 82,634.48. The Nifty 50 index added 16.25 points or 0.06% to 25,212.05.
- The S&P BSE Mid-Cap index rose 0.10% and the S&P BSE Small-Cap index added 0.28%.
- Among the sectoral indices, the Nifty PSU Bank index (up 1.81%), the Nifty Media index (up 1.31%) and the Nifty IT index (up 0.63%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (down 0.54%), the Nifty Healthcare index (down 0.34%) and the Nifty Pharma index (down 0.32%) 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 **3334** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **LT, BHARTIARTL, SBIN, INFY**.
- Short** position build up for the **July** series has been witnessed in **RELIANCE, ICICIBANK, HDFCBANK, BAJFINANCE**.
- Unwinding** position for the **July** series has been witnessed in **LTIM, BAJAJ-AUTO, TATATECH**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57168.95	57006.65	0.28%
NIFTY AUTO	24011.15	23905.25	0.44%
NIFTY FMCG	56685.55	56429.05	0.45%
NIFTY IT	37660.70	37424.60	0.63%
NIFTY METAL	9360.70	9411.95	-0.54%
NIFTY PHARMA	22593.90	22665.70	-0.32%
NIFTY REALTY	988.85	983.95	0.50%
BSE CG	71236.84	71408.93	-0.24%
BSE CD	60187.29	60065.18	0.20%
BSE Oil & GAS	28065.79	27996.60	0.25%
BSE POWER	6932.07	6925.00	0.10%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39663.40	39678.02	-0.04%
HANG SENG	24517.76	24590.12	-0.29%
STRAITS TIMES	4132.25	4119.82	0.30%
SHANGHAI	3503.78	3505.00	-0.03%
KOSPI	3186.38	3215.28	-0.90%
JAKARTA	7192.02	7140.47	0.72%
TAIWAN	23042.90	22835.94	0.91%
KLSE COMPOSITE	1511.50	1525.40	-0.91%
ALL ORDINARIES	8816.40	8875.30	-0.66%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	94737.64	96302.03
NSE F&O	138993.50	130512.88

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1858.15

(Source: [NSE](#))

Corporate News

- ICICI Lombard General Insurance Company Ltd.** reported a net profit after tax of Rs 746.6 crore, marking a strong 47.6% jump year-on-year from Rs 505.9 crore in Q1 FY25. Net premiums written rose to Rs 5,61,052 lakh, up 4.7% from Rs 5,36,053 lakh in Q1 FY25. Net premium earned came in at Rs 5,13,609 lakh, registering a 14% growth from Rs 4,50,388 lakh last year.
- HDFC Life** reported a 14% jump in its net profit to Rs 546 crore for the June quarter of fiscal year 2026. The company had reported the net profit at Rs 478 crore in the same quarter of the previous fiscal. The total Annual Premium Equivalent (APE) was lower than the expectations which stood at Rs 3,225 crore, against Moneycontrol estimate of Rs 3,273 crore. The retail APE stood at Rs 2,777 crore.
- ITC Hotels** reported a net profit of Rs 133 crore for the first quarter of the ongoing financial year 2026. This marks a 54% on-year jump from the Rs 87 crore net profit reported in the corresponding quarter of the previous financial year. Revenue rose 15.5% on-year to Rs 815.54 crore in Q1 FY26 from Rs 705.84 crore in Q1 FY25.
- HDB Financial Services** reported a net profit of Rs 568 crore for the first quarter of the financial year 2026. This marks a fall of over 2% from the Rs 582 crore net profit reported in the corresponding quarter of the previous financial year. The NBFC also reported a 15% rise in revenue from operations to Rs 4,465 crore for Q1 FY26. It had reported a revenue of Rs 3,884 crore for Q1 FY25.
- Zyus Lifesciences** announced that it has received final approval from the United States Food and Drug Administration (USFDA) for its Celecoxib Capsules, marking another addition to its growing U.S. generics portfolio.
- Biocon Biologics** has secured USFDA approval for Kirsty. Kirsty is an interchangeable biosimilar to NovoLog, used for diabetes treatment. It is a rapid-acting insulin analog. The medication will be available in prefilled pens and vials. This approval expands Biocon's insulin portfolio. Kirsty has been available in Europe and Canada since 2022. The US market for Insulin Aspart is significant.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
M&M	3196.50	3128.60	2.17%
WIPRO	262.80	257.40	2.10%
SBIN	831.70	816.45	1.87%
TECHM	1607.90	1579.00	1.83%
NESTLEIND	2460.00	2416.30	1.81%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	668.35	684.45	-2.35%
ETERNAL	262.35	266.45	-1.54%
SUNPHARMA	1701.00	1727.50	-1.53%
TATASTEEL	157.33	159.00	-1.05%
CIPLA	1475.80	1490.90	-1.01%

(Source: [Moneycontrol](#))

- **Just Dial** reported a 13% rise in net profit for the April-June quarter, reaching Rs. 159.6 crore as per its regulatory filing. Revenue increased by about 6% to Rs. 297.8 crore in the first quarter of FY26.
- **DB Corp** posted consolidated net sales at Rs 559.45 crore in June 2025 down 5.15% from Rs. 589.85 crore in June 2024. Net profit at Rs. 80.84 crore in June 2025 down 31.41% from Rs. 117.87 crore in June 2024.
- **Network 18 Media & Investments** posted consolidated net sales at Rs 467.86 crore in June 2025 down 85.1% from Rs. 3,140.92 crore in June 2024. Net profit at Rs. 148.03 crore in June 2025 up 244.55% from Rs. 102.41 crore in June 2024.
- **Hathway Cable and Datacom** posted consolidated net sales at Rs 530.50 crore in June 2025 up 5.55% from Rs. 502.61 crore in June 2024. Net profit at Rs. 31.03 crore in June 2025 up 69.01% from Rs. 18.36 crore in June 2024.
- **Onward Technologies** posted consolidated net sales at Rs 133.15 crore in June 2025 up 13.23% from Rs. 117.60 crore in June 2024. Net profit at Rs. 12.73 crore in June 2025 up 79.62% from Rs. 7.09 crore in June 2024.
- **Amara Partners**, founded by Parag Shah, is nearing the close of its debut Rs. 800 crore fund, with Anand Mahindra as a key investor. The fund has already secured Rs. 650 crore domestically and aims to attract multinational executives.
- **MTNL** has defaulted on payments of Rs. 8,585 crore to several public sector banks, including Union Bank of India and Bank of India. The defaults, spanning from August 2024 to February 2025, include overdue principal of Rs. 7,794.34 crore and unpaid interest of Rs. 790.59 crore.
- **GAIL** is in preliminary discussions to procure LNG from the Alaska LNG project, aligning with India's aim to boost energy imports from the U.S. and diversify its energy mix. The potential deal hinges on the landed cost of LNG, with GAIL planning to expand its Dabhol LNG terminal capacity significantly.
- **Lupin** announced that it has launched Loteprednol Etabonate Ophthalmic Suspension in the United States.
- **Shilpa Medicare** shares zoomed over 4% after the company announced that it has received an Establishment Inspection Report (EIR) for the Bengaluru unit from the USFDA.
- **Suven Life Sciences** announced that the first patient has been randomized in its Phase-2b clinical trial evaluating Ropanicant, a novel oral $\alpha 4\beta 2$ nicotinic acetylcholine receptor (nAChR) antagonist, for the treatment of Major Depressive Disorder (MDD).
- **Premier Explosives** secured an export order worth Rs 105 crore from an international client for the manufacture and supply of defence explosives. The total value of the order is \$12.24 million (approximately Rs 105 crore), and the execution is expected to be completed within 12 months.
- CFF Fluid Control announced the signing of a memorandum of understanding (MoU) with **Garden Reach Shipbuilders and Engineers** for enhancing CFF's portfolio in Naval & Marine Systems.

- **L T Foods** has announced that its organic business arm, Nature Bio Foods, has forayed into the Business-to-Consumer (B2C) segment in Europe with the inauguration of a new facility in Maasvlakte, Rotterdam.
- **Dixon Technologies (India)** announced two major strategic agreements aimed at strengthening its presence in India's electronics component ecosystem.
- **State Bank of India** announced that its Central Board has approved raising up to Rs 20,000 crore through Basel III compliant Additional Tier 1 and Tier 2 bonds in FY26.
- **Container Corporation of India** said that it has signed a memorandum of understanding (MoU) with Rais Hassan Saadi Group (RHS), Dubai, for exploring collaborative opportunities in the overseas shipping and logistics sector.
- **PNC Infratech** has announced that it has emerged as one of the Lowest (L1) Bidders in a tender floated by NHPC for the development of 1200 MW ISTS (Inter State Transmission System) connected solar power projects across India.

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

Global News

- U.S. consumer price index rose by 0.3% in June after inching up by 0.1% in May. The annual rate of consumer price growth accelerated to 2.7% in June from 2.4% in July. The core consumer price index edged up by 0.2% in June after creeping up by 0.1% in May. The annual rate of core consumer price growth ticked up to 2.9% in June from 2.8% in May.
- U.K. annual inflation rate rose to 3.6% in June 2025, the highest since January 2024, up from 3.4% in May. On a monthly basis, the CPI rose by 0.3%, above the 0.2% increase in May. The annual core inflation accelerated to 3.7% in June 2025, surpassing May's figure. On a monthly basis, core consumer prices increased by 0.4%, doubling May's 0.2% gain.
- U.K. house prices in May were 3.9% higher than a year earlier, after a 3.6% rise in the year to April.
- Eurozone's trade surplus widened to EUR 16.2 billion in May 2025 from EUR 12.7 billion a year earlier, as exports rose 0.9% while imports declined 0.6%.

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

Economic News

- Crude Oil traded at US\$ 65.83/bbl (IST 17:00).
- INR weakened to Rs. 85.94 from Rs. 85.81 against each US\$ resulting in daily change of 0.15%.
- ICRA forecasts a 15% surge in India's sugar output for SY2026, driven by favorable monsoons boosting sugarcane yields in key states like Maharashtra and Karnataka. This increase will likely expand sugar companies' revenues by 6-8%. While sugar prices are expected to remain firm, the report emphasizes the need for ethanol price revisions to sustain distillery profitability despite encouraging blending trends.
- Youth unemployment edged up in June, with 15.3% of individuals aged 15-29 who were working or seeking work

remaining jobless, up from 15% in May. The rate was higher among females (17.4%) than males (14.7%). Overall, the unemployment rate among women declined to 5.6% in June from 5.8% in May, while it remained unchanged at 5.6% for males.

- India's goods exports to the US surged by 23.53% in June, reaching USD 8.3 billion, while imports decreased by 10.61% to USD 4 billion. During April-June, exports to the US rose by 22.18% to USD 25.51 billion. The US emerged as India's largest trading partner in the April-June quarter of 2025-26, as both nations engage in trade agreement negotiations.
- The Union Cabinet is expected to have approved the Prime Minister Dhan Dhanya Krishi Yojana, initially announced during the Union Budget 2025-26. This agricultural scheme targets 100 districts characterized by low productivity and aims to enhance agricultural output through crop diversification and sustainable practices. Government estimates suggest that the program will benefit approximately 1.7 crore farmers.
- India's renewable energy sector added 7.3 GW in June 2025, up 420% from last year. Solar capacity alone has jumped 4,000% since 2014, reaching 117 GW, while wind energy climbed 140% to 51.7 GW. Cheaper solar tariffs and strong foreign investment-Rs. 1.6 lakh crore since 2020-are driving this boom. The government says renewables now dominate new power investments and are making the energy transition cheaper, cleaner and more inclusive for millions.

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

Forthcoming Events

Board Meetings as on 17/07/2025

Wipro Limited	Financial Results/Dividend
Jio Financial Services Limited	Financial Results
Tata Communications Limited	Financial Results/Fund Raising
The Indian Hotels Company Limited	Financial Results
Axis Bank Limited	Financial Results
CEAT Limited	Financial Results
Clean Science and Technology Limited	Financial Results
HDFC Asset Management Company Limited	Financial Results
Shoppers Stop Limited	Financial Results
LTIMindtree Limited	Financial Results
The Indian Hotels Company Limited	Financial Results
Polycab India Limited	Financial Results
360 ONE WAM LIMITED	Financial Results
Heritage Foods Limited	Financial Results
LMW Limited	Financial Results
Navkar Corporation Limited	Financial Results
Newgen Software Technologies Limited	Financial Results
Nuvoco Vistas Corporation Limited	Financial Results
Patanjali Foods Limited	Bonus
ROUTE MOBILE LIMITED	Financial Results/Dividend

Sterling and Wilson Renewable Energy Limited	Financial Results
Sunteck Realty Limited	Financial Results
The South Indian Bank Limited	Financial Results/Fund Raising
Vimta Labs Limited	Financial Results
Waaree Renewable Technologies Limited	Financial Results
Alok Industries Limited	Financial Results

(Source: NSE)

Corporate Actions as on 17/07/2025

Coromandel International Limited	Dividend - Rs 6 Per Share & Special Dividend Rs 3 Per Share
GHCL Limited	Dividend - Rs 12 Per Share
Graphite India Limited	Dividend - Rs 11 Per Share
Oriental Hotels Limited	Dividend - Re 0.50 Per Share
PDS Limited	Dividend - Rs 1.70 Per Share

(Source: NSE)

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