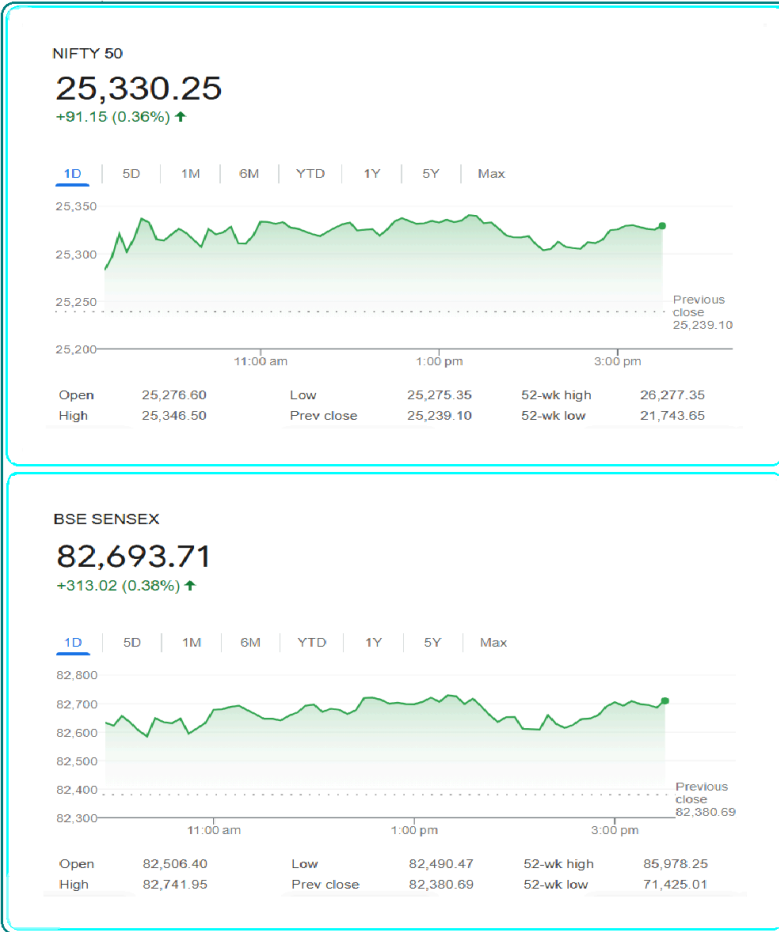


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	25330.25	25239.10	<b>0.36%</b>
<b>S&amp;P BSE SENSEX</b>	82693.71	82380.69	<b>0.38%</b>
<b>NIFTY MID100</b>	58848.55	58799.55	<b>0.08%</b>
<b>NIFTY SML100</b>	18423.20	18298.35	<b>0.68%</b>

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

## Market Wrap Up

- The domestic equity benchmarks ended with decent gains today, rising for a second straight session, supported by optimism over progress in India-U.S. trade negotiations and expectations of an interest rate cut by the Federal Reserve later in the day. The Nifty settled above the 25,300 level.
- The S&P BSE Sensex rallied 313.02 points or 0.38% to 82,693.71. The Nifty 50 index added 91.15 points or 0.36% to 25,330.25. In two consecutive trading sessions, the Sensex added 1.11% while the Nifty added 1.04%.
- The S&P BSE Mid-Cap index rose 0.19% and the S&P BSE Small-Cap index added 0.51%.
- Among the sectoral indices, the Nifty PSU Bank index (up 2.61%), the Nifty IT index (up 0.65%) and the Nifty Oil & Gas index (up 0.63%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (down 0.50%), the Nifty MidSmall Healthcare index (down 0.44%) and the Nifty Consumer Durables (down 0.30%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **September** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **2710** contracts at the end of the day.
- Long** position build up for the **September** series has been witnessed in **LT, BHARTIARTL, SBIN, HDFCBANK, INFY**.
- Short** position build up for the **September** series has been witnessed in **ICICIBANK, MARICO, TITAN, ITC**.
- Unwinding** position for the **September** series has been witnessed in **RELIANCE, BHEL, ONGC**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55493.30	55147.60	0.63%
NIFTY AUTO	27294.65	27146.40	0.55%
NIFTY FMCG	56321.00	56398.65	-0.14%
NIFTY IT	36447.15	36212.15	0.65%
NIFTY METAL	9923.15	9973.45	-0.50%
NIFTY PHARMA	22241.35	22264.55	-0.10%
NIFTY REALTY	919.10	915.35	0.41%
BSE CG	71414.69	70738.19	0.96%
BSE CD	61474.33	61575.57	-0.16%
BSE Oil & GAS	26630.82	26449.63	0.69%
BSE POWER	6774.03	6780.73	-0.10%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	44790.38	44902.27	-0.25%
HANG SENG	26908.39	26438.51	1.78%
STRAITS TIMES	4323.78	4337.74	-0.32%
SHANGHAI	3876.34	3861.86	0.37%
KOSPI	3413.40	3449.62	-1.05%
JAKARTA	8025.18	7957.70	0.85%
TAIWAN	25438.25	25629.64	-0.75%
KLSE COMPOSITE	1611.70	1600.13	0.72%
ALL ORDINARIES	9094.90	9151.20	-0.62%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	101041.26	91048.46
NSE F&O	131676.97	134821.08

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1124.54

(Source: [NSE](#))

## Corporate News

- **Tata Consultancy Services** has entered into a strategic partnership with The Warehouse Group (TWG) to help the Kiwi retailer modernise its technology backbone and cut costs. The collaboration will focus on consolidating and streamlining TWG's managed services, reducing technology debt, and upgrading IT platforms. TCS will also work on upskilling employees in digital and AI tools.
- **State Bank of India** has finalized the divestment of a 13.18% stake in Yes Bank to Sumitomo Mitsui Banking Corporation (SMBC) for approximately Rs 8,889 crore. This transaction involved the sale of 413.44 crore equity shares at Rs 21.50 per share.
- **Hindustan Zinc's** Rs 1,700-crore fertiliser plant in Rajasthan is expected to begin operations by December next year.
- **RailTel Corporation of India** announced that it has received a work order worth Rs. 105.74 Crore. The company has received this order from Bihar Education Project Council (BEPC). The order includes supply, procurement, and installation of smart classrooms in the state.
- **ICICI Bank** has received a demand notice of Rs 49.11 crore from tax authorities in West Bengal for alleged short payment of GST. The demand includes tax, interest, and penalty components, with a significant portion related to GST on services provided to customers maintaining minimum balances. The bank plans to contest the order through an appeal.
- **Suzlon Energy Ltd.** has secured a large order for financial year 2026 on Tuesday, September 16. The company informed the bourses that this order has been received from Tata Power Renewable Energy Ltd. as part of its Firm and Dispatch Renewable Energy (FDRE) project. The order is for an 838 MW project.
- **JSW Infrastructure Ltd** has entered into a 30-year concession agreement with Syama Prasad Mookerjee Port Authority, Kolkata. The project includes modernisation of a major berth project at the city's Netaji Subhash Dock.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TATACONSUM	1136.30	1092.10	4.05%
SBIN	857.15	831.55	3.08%
BEL	412.20	402.90	2.31%
MARUTI	15801.00	15573.00	1.46%
KOTAKBANK	2050.30	2021.70	1.41%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
BAJAJFINSV	2057.00	2080.30	-1.12%
TITAN	3523.00	3556.80	-0.95%
ITC	409.30	413.10	-0.92%
HDFCLIFE	768.05	774.35	-0.81%
SBILIFE	1804.00	1818.80	-0.81%

(Source: [Moneycontrol](#))

- **Havells India** announced that the company has been issued an offer for allotment of additional Land measuring 1,58,200 square metres by the Rajasthan State Industrial Development & Investment Corporation (RIICO), Alwar.
- **Lupin Ltd** said the US Food and Drug Administration (USFDA) issued six observations for its Nagpur injectable facility. The inspection was held between September 8 and 16. Lupin did not disclose the details of the observations but said it would respond within the required timeline.
- **Bharat Electronics Limited** has received new orders of upto Rs. 712 crore since starting of this month. These orders are under IT infrastructure, cybersecurity, ESM systems, blockchain, and communication projects.
- Mahindra Lifespace Developers has been selected as the development partner for two society redevelopment projects in Chembur, Mumbai, with a combined gross development value (GDV) of approximately Rs 1,700 crore.
- Dr Reddy's Laboratories has announced that it has launched the novel molecule Tegoprazan, for acid-related gastrointestinal diseases in India, under the name PCAB.
- Adani Enterprises has received a letter of award (LoA) from National Highways Logistics Management (NHLML) to construct the much-anticipated ropeway project connecting Sonprayag to Kedarnath.

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

## Global News

- U.S. retail sales climbed by 0.6% in August, matching an upwardly revised increase in July. Core retail sales grew by 0.7% in August after rising by an upwardly revised 0.4% in July.
- U.S. industrial production crept up by 0.1% in August after falling by a downwardly revised 0.4% in July. Manufacturing output increased 0.2% in August, decrease after a 0.2% fall in July.
- U.S. import prices rose by 0.3% in August after inching up by a downwardly revised 0.2% in July. Export prices climbed by 0.3% in August, matching an upwardly revised increase in July.
- U.S. business inventories rose by 0.2% in July, matching the increase seen June.
- U.K. annual inflation rate held steady at 3.8% in August 2025, unchanged from July. On a monthly basis, the CPI rose 0.3%, following a 0.1% gain in July. Annual core inflation eased to 3.6% from 3.8%.
- U.K. house prices were 2.8% higher than a year earlier, down from a 3.6% in July rise in the year to June.

- Eurozone consumer price inflation stood at 2.0% in August 2025. Core inflation held steady at 2.3%.
- Japan's trade deficit decreased significantly to JPY 242.5 billion in August 2025 from JPY 711.4 billion in the same month a year earlier. Purchases shrank 5.2% year-on-year to the lowest amount in six months of JPY 8,667.7 billion. Meanwhile, exports slipped 0.1%.

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

## Economic News

- Crude Oil traded at US\$ 64.29/bbl (IST 17:00).
- INR strengthened to Rs. 87.82 from Rs. 88.07 against each US\$ resulting in daily change of 0.28%.
- India's unemployment rate witnessed a decline, reaching 5.1% in August 2025, indicates a continuous decrease from 5.6% in June and 5.2% in July, reflecting signs of recovery.
- The European Commission plans stronger ties with India in defence, tech, and trade. A free trade agreement is aimed for by year-end. This comes as India balances relations with Russia and China. Despite tensions over Russian oil purchases, the EU sees India as a key partner.
- India's tea exports experienced a slight increase, reaching 125.01 million kg in the first half of 2025, marginally up from 124.57 million kg in 2024. North Indian tea exports rose significantly, while South Indian exports saw a decline. The value of exports increased to Rs 3639.45 crore, with improved unit price realization at Rs 291.13 per kg.

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

## Forthcoming Events

### Board Meetings as on 18/09/2025

Godawari Power And Ispat limited	Fund Raising
Kaya Limited	Fund Raising
Tega Industries Limited	Fund Raising
Transwarranty Finance Limited	Fund Raising

(Source: NSE)

## Corporate Actions as on 18/09/2025

Honda India Power Products Limited	Dividend - Rs 21.50 Per Share
Gujarat Mineral Development Corporation Limited	Dividend - Rs 10.10 Per Share
Jamna Auto Industries Limited	Dividend - Rs 1.10 Per Share
Hindustan Copper Limited	Dividend - Rs 1.46 Per Share
NCL Industries Limited	Dividend - Rs 2 Per Share
ZyduS Wellness Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 2/- Per Share
Apollo Sindoori Hotels Limited	Dividend - Rs 2 Per Share
Arrow Greentech Limited	Dividend - Rs 4 Per Share
Ashiana Housing Limited	Dividend - Rs 1.50 Per Share
Bal Pharma Limited	Dividend - Rs 1.20 Per Share
Eldeco Housing And Industries Limited	Dividend - Rs 9 Per Share
Goodluck India Limited	Dividend - Rs 4 Per Share
Hindustan Composites Limited	Dividend - Rs 2 Per Share
Indraprastha Medical Corporation Limited	Dividend - Rs 4.50 Per Share
IRM Energy Limited	Dividend - Rs 1.50 Per Share
Poly Medicure Limited	Dividend - Rs 3.50 Per Share
PPAP Automotive Limited	Dividend - Rs 1.50 Per Share
Shakti Pumps (India) Limited	Dividend - Re 1 Per Share
Star Paper Mills Limited	Dividend - Rs 3.50 Per Share
Sterling Tools Limited	Dividend - Rs 2.50 Per Share

(Source: NSE)

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : [helpdesk@shriraminsight.com](mailto:helpdesk@shriraminsight.com) | [www.shriraminsight.com](http://www.shriraminsight.com) |