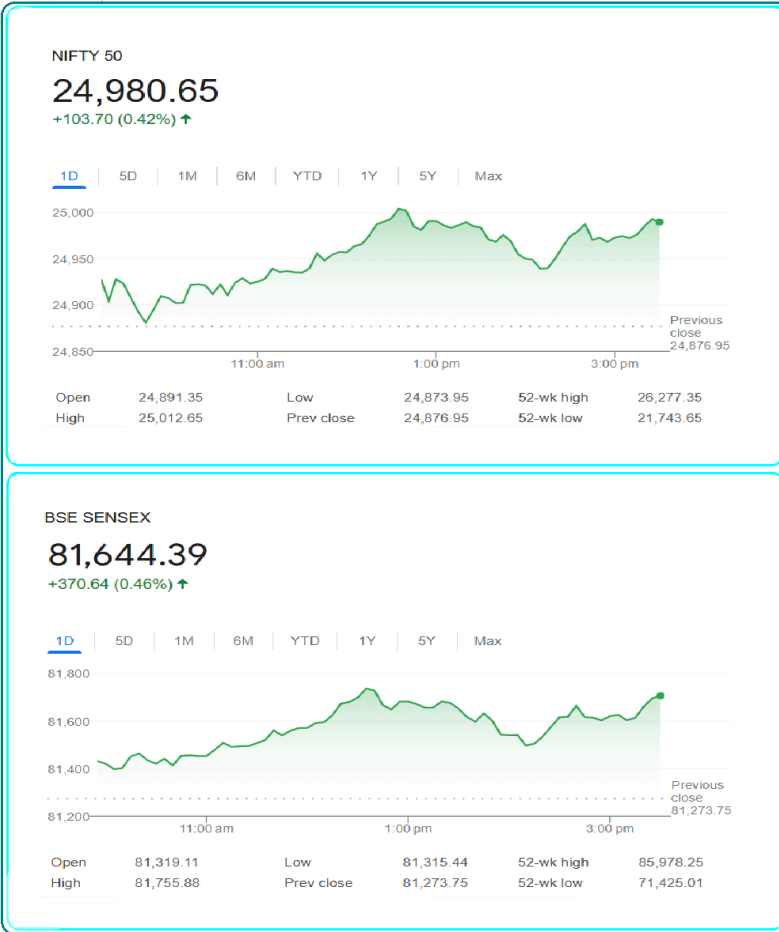


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24980.65	24876.95	0.42%
S&P BSE SENSEX	81644.39	81273.75	0.46%
NIFTY MID100	57664.65	57113.15	0.97%
NIFTY SML100	17914.30	17790.40	0.70%

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

Market Wrap Up

- The key equity barometers ended with modest gains today, extending their winning streak to a fourth straight session, as investor sentiment was buoyed by optimism surrounding potential GST reforms and positive signals from ongoing Russia-Ukraine peace talks. The Nifty settled above the 24,950 mark.
- The S&P BSE Sensex rallied 370.64 points or 0.46% to 81,644.39. The Nifty 50 index added 103.70 points or 0.42% to 24,980.65. In the past four trading sessions, the Sensex and Nifty jumped 1.75% and 2.01%, respectively.
- The S&P BSE Mid-Cap index added 0.97% and the S&P BSE Small-Cap index rose 0.97%.
- Among the sectoral indices, the Nifty Oil & Gas index (up 1.66%), the Nifty Media index (up 1.34%) and the Nifty FMCG index (up 1.05%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Pharma index (down 0.34%), the Nifty Financial Services index (down 0.06%) and the Nifty Healthcare index (down 0.05%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **August** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **2742** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **GODREJCP, PAYTM, DELHIVERY**.
- Short** position build up for the **August** series has been witnessed in **BAJAJFINSV, SHREECEM, GLENMARK**.
- Unwinding** position for the **August** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, BAJFINANCE, INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55865.15	55734.90	0.23%
NIFTY AUTO	25456.70	25127.20	1.31%
NIFTY FMCG	55886.65	55304.25	1.05%
NIFTY IT	34756.70	34634.95	0.35%
NIFTY METAL	9457.50	9387.50	0.75%
NIFTY PHARMA	22066.75	22141.15	-0.34%
NIFTY REALTY	904.30	898.45	0.65%
BSE CG	67038.83	66773.05	0.40%
BSE CD	61111.19	60879.51	0.38%
BSE Oil & GAS	26430.83	26042.29	1.49%
BSE POWER	6620.12	6590.12	0.46%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	43546.29	43714.31	-0.38%
HANG SENG	25122.90	25176.85	-0.21%
STRAITS TIMES	4216.19	4187.38	0.69%
SHANGHAI	3727.29	3728.03	-0.02%
KOSPI	3151.56	3177.28	-0.81%
JAKARTA	7862.95	7898.38	-0.45%
TAIWAN	24353.50	24482.52	-0.53%
KLSE COMPOSITE	1590.24	1584.96	0.33%
ALL ORDINARIES	9173.80	9233.50	-0.65%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	87634.99	106993.56
NSE F&O	128860.34	175792.91

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	634.26

(Source: [NSE](#))

Corporate News

- **Reliance Jio** discontinued its entry-level 1 GB/day plan, effectively pushing customers toward higher-value data offerings.
- **Reliance Consumer** acquires majority stake in JV with Naturedge Beverages.
- **Tata Consultancy Services** has opened a new AI-driven operations center in Mexico City, reiterating the company's commitment to continue accelerating innovation in Mexico and Latin America. The new office in Mexico City is TCS' eighth operations center in Mexico where the company has built a workforce of over 11,000 highly skilled associates over the last 22 years.
- **Coal India Ltd.** has partnered with Konkan Railway Corporation Ltd. to enhance rail infrastructure for CIL and its subsidiaries, aiming to improve coal transportation. This move follows a previous agreement with Indian Port Rail & Ropeway Corporation Ltd. CIL produced 781.1 MT of coal in FY25 and targets 875 MT production and 900 MT offtake in FY26.
- **Reliance Infrastructure** has received a Letter of Award from NHPC for a 390 MW solar power project and a 780 MWh battery energy storage system (BESS). This addition brings the Reliance Group's clean energy portfolio to over 3 GWp of solar and 3.5 GWh of BESS capacity, making it India's largest integrated Solar + BESS player. The project's tariff was set at ₹3.13/kWh, among the most competitive in the sector.
- **Waaree Energies'** planned acquisition of Enel Green Power India is close to falling apart due to disagreements over unmet conditions in their January agreement. Both parties are now negotiating a breakup, but the discussions are reportedly tense.
- **Hindustan Zinc**, a Vedanta subsidiary, is investing Rs 3,823 crore in a 10 MTPA Tailings Reprocessing plant, a first in India, to recover metal from tailings and reduce its environmental impact. This initiative is part of a larger plan to double production capacity, targeting annual revenue of Rs 62,000-65,000 crore and increasing silver production to 1,500 tonnes.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TATAMOTORS	700.25	676.00	3.59%
ADANI PORTS	1369.40	1327.20	3.18%
RELIANCE	1420.10	1381.70	2.78%
HEROMOTOCO	5118.20	4984.00	2.69%
BAJAJ-AUTO	8795.50	8588.50	2.41%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
DRREDDY	1244.20	1262.70	-1.47%
BAJAJFINSV	1972.20	1993.50	-1.07%
CIPLA	1548.90	1565.20	-1.04%
HINDALCO	706.70	714.15	-1.04%
M&M	3354.00	3383.10	-0.86%

(Source: [Moneycontrol](#))

- Glenmark, Alembic Pharmaceuticals, and Sun Pharma** are recalling various products in the US due to manufacturing issues, according to the USFDA. **Glenmark** is recalling Carvedilol tablets due to nitrosamine impurity and Theophylline tablets for failed dissolution. **Alembic** is recalling Doxepin capsules for a similar impurity issue, while **Sun Pharma** recalls Spironolactone tablets due to aluminum contamination.
- Glenmark Pharmaceuticals** announced that its U.S.-based subsidiary, Glenmark Pharmaceuticals Inc., USA, will launch Micafungin for Injection USP, 50 mg/vial and 100 mg/vial (Single-Dose Vial), in the U.S. market this September.
- Alembic Pharmaceuticals** has secured USFDA approval for its generic Tretinoin Cream USP (0.025%), a treatment for acne vulgaris. This ANDA is therapeutically equivalent to Bausch Health US, LLC's Retin-A Cream. The market size for Tretinoin cream USP (0.025%) is estimated at USD 94 million for the twelve months ending June 2025.
- Alkem Laboratories** announced the launch of Olesoft Trucera moisturizing lotion, an advanced science-led formulation designed to restore hydration, strengthen the skin barrier, and soothe skin flare ups with an inside out approach.
- Marksans Pharma** announced that its wholly owned UK-based subsidiary, Relonchem, has received Marketing Authorization for Metformin Hydrochloride Relonchem 500 mg, 750 mg, and 1000 mg Prolonged release tablets

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

- Escorts Kubota** has received a sanction letter for refund of Rs. 46.37 Crore from the Excise & Taxation Officer, Faridabad (East), Haryana. The company has claimed a total refund of Rs. 46.67 Crore under Rule 89(1) of the Haryana GST Act, 2017.
- SPML Infra** has announced it has received an order worth Rs 1,073 crore project from the Indore Municipal Corporation for the augmentation of the city's water supply system under the Government of India's AMRUT 2.0 initiative.
- VA Tech Wabag** announced that it has bagged a repeat order worth approximately 5.12 million Bahraini Dinars (around Rs 118 crore) from the Ministry of Works, Municipalities Affairs and Urban Planning (MoW) in the Kingdom of Bahrain.

Global News

- China's youth jobless rate for 16- to 24-year-olds, excluding college students, jumped to 17.8% in July 2025 from 14.5% in June.
- Eurozone's current account surplus narrowed to EUR 38.9 billion in June 2025 from EUR 51.9 billion a year earlier.
- Hong Kong's seasonally adjusted unemployment rate rose to 3.7% in the three months ending July 2025, up from 3.5% in the previous period.

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

Economic News

- Crude Oil traded at US\$ 62.55/bbl (IST 17:00).
- INR strengthened to Rs. 86.95 from Rs. 87.35 against each US\$ resulting in daily change of 0.46%.
- India's unemployment rate fell to a three-month low of 5.2% in July from 5.6% in June.
- ICRA projects India's Q1 FY26 GDP growth at 6.7 per cent. This exceeds the RBI's 6.5 per cent estimate. Services are expected to rise, offsetting industrial and agricultural slowdowns. Government spending boosts growth. New project announcements nearly doubled. GST rationalization could strengthen urban consumption. The agency anticipates positive trends in government revenue and expenditure.
- The CAG report reveals that while the central government's debt-to-GDP ratio improved between 2021-22 and 2023-24, its interest payments, as a percentage of revenue receipts, increased during the same period. The interest outgo reached 35.72% in 2023-24. Despite this, debt sustainability showed a positive indicator towards stability in FY24, with debt as a percentage of GDP moderating to 57%.
- The Indian government has exempted import duty on cotton from August 19 to September 30 to ease supply shortages and support the textile sector. Industry leaders had advocated for the removal of the 11% duty, both to lower input costs and as a strategic tool in trade negotiations with the US.
- The Centre's proposal for a two-tier GST structure with a special 40 per cent rate anticipates the 18 per cent slab remaining the primary revenue contributor. This restructuring involves eliminating the 12 and 28 per cent slabs, shifting most items to either 5 or 18 per cent.
- India and China are cautiously recalibrating trade ties, with Beijing lifting export restrictions on key materials. This follows recent diplomatic talks and signals a pragmatic approach to cooperation amidst global uncertainty. While both nations are easing visa restrictions and discussing direct flights, significant challenges remain.

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

Forthcoming Events

Board Meetings as on 20/08/2025

Godha Cabcon & Insulation Limited	Financial Results
GRM Overseas Limited	Bonus
PVP Ventures Limited	Financial Results
The South Indian Bank Limited	Buyback

(Source: NSE)

Corporate Actions as on 20/08/2025

Bhansali Engineering Polymers Limited	Interim Dividend - Re 1 Per Share
Ecos (India) Mobility & Hospitality Limited	Dividend - Rs 2.40 Per Share
Senco Gold Limited	Dividend - Re 1 Per Sh
Sukhjit Starch & Chemicals Limited	Dividend - Re 1 Per Share

(Source: NSE)

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