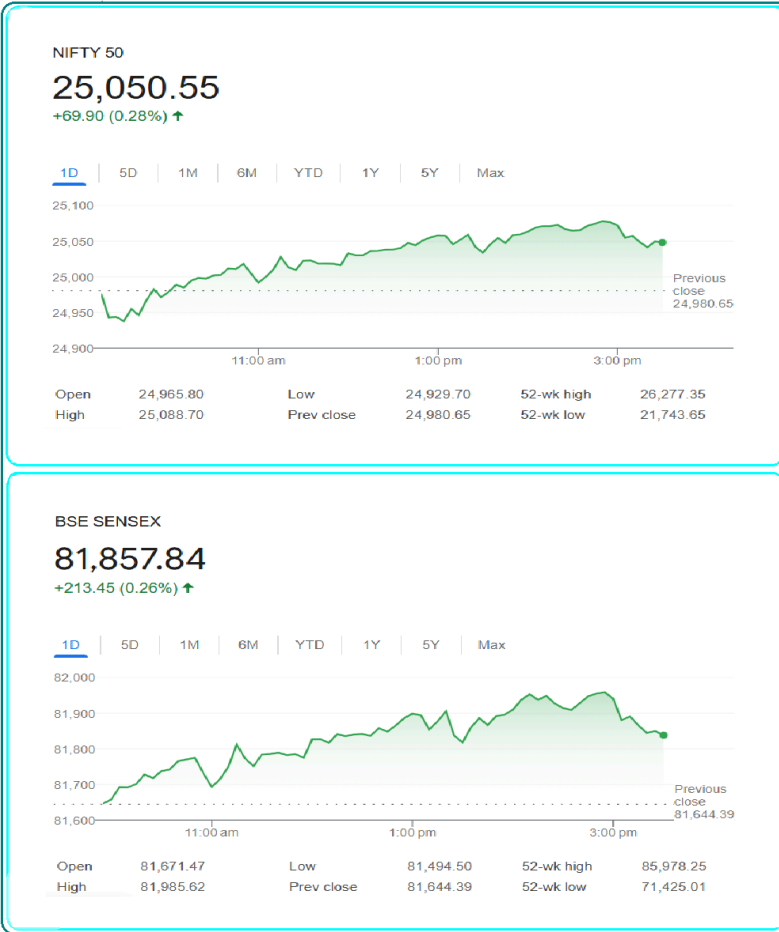


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	25050.55	24980.65	<b>0.28%</b>
<b>S&amp;P BSE SENSEX</b>	81857.84	81644.39	<b>0.26%</b>
<b>NIFTY MID100</b>	57930.50	57664.65	<b>0.46%</b>
<b>NIFTY SML100</b>	17968.40	17914.30	<b>0.30%</b>

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

## Market Wrap Up

- The domestic equity benchmarks ended with minor gains today, extending their winning streak to a fifth straight session. The upward momentum was driven by strong buying in IT, realty, and FMCG stocks, as investors remained optimistic ahead of the U.S. Federal Reserve's Jackson Hole conference. The Nifty settled near 25,050 mark.
- The S&P BSE Sensex advanced 213.45 points or 0.26% to 81,857.84. The Nifty 50 index added 69.90 points or 0.28% to 25,050.55. In the past five trading sessions, the Sensex and Nifty jumped 2.02% and 2.29%, respectively.
- The S&P BSE Mid-Cap index added 0.39% and the S&P BSE Small-Cap index rose 0.30%.
- Among the sectoral indices, the Nifty IT index (up 2.69%), the Nifty FMCG index (up 1.39%) and the Nifty Realty index (up 1.06%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 1.98%), the Nifty Pharma index (down 0.44%) and the Nifty Private Bank index (down 0.36%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **August** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **897** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **BHARTIARTL, INFY, ETERNAL**.
- Short** position build up for the **August** series has been witnessed in **RELIANCE, LT, SBIN, ICICIBANK, HDFCBANK, BAJFINANCE**.
- Unwinding** position for the **August** series has been witnessed in **LTIM, PFC, DELHIVERY**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55698.50	55865.15	-0.30%
NIFTY AUTO	25469.25	25456.70	0.05%
NIFTY FMCG	56664.05	55886.65	1.39%
NIFTY IT	35690.05	34756.70	2.69%
NIFTY METAL	9497.75	9457.50	0.43%
NIFTY PHARMA	21969.50	22066.75	-0.44%
NIFTY REALTY	913.85	904.30	1.06%
BSE CG	67127.01	67038.83	0.13%
BSE CD	61114.32	61111.19	0.01%
BSE Oil & GAS	26389.22	26430.83	-0.16%
BSE POWER	6654.77	6620.12	0.52%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	42888.55	43546.29	-1.51%
HANG SENG	25165.94	25122.90	0.17%
STRAITS TIMES	4219.54	4216.19	0.08%
SHANGHAI	3766.21	3727.29	1.04%
KOSPI	3130.09	3151.56	-0.68%
JAKARTA	7943.83	7862.95	1.03%
TAIWAN	23625.44	24353.50	-2.99%
KLSE COMPOSITE	1588.21	1590.24	-0.13%
ALL ORDINARIES	9177.40	9173.80	0.04%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	96170.86	87634.99
NSE F&O	150040.84	128860.34

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1100.09

(Source: [NSE](#))

## Corporate News

- Tata Motors** is re-entering South Africa's passenger vehicle market after a six-year hiatus, introducing a range of SUVs and a hatchback to compete with Chinese automakers. The company aims to capture a significant market share by offering budget-friendly options. Tata plans to expand its dealership network and introduce additional models in the future, partnering with Motus Holdings for distribution.
- Welspun** One Logistics Parks is significantly expanding its presence in South India with a Rs 2,150 crore investment in Bengaluru. The acquisition of two land parcels in Hoskote and Devanahalli will unlock over 6 million sq. ft. of development potential.
- Indian Oil** and **Bharat Petroleum** are buying Russian Urals crude again. The refiners stopped buying in July. Now, they are resuming purchases for September. This is because the discount on Urals has increased. Also, China is buying more Urals crude. The discount is now about \$3 per barrel. This makes it attractive for Indian refiners.
- Hero MotoCorp** has launched the Glamour X 125, starting at Rs 89,999, featuring a sporty design and a 124.7cc engine derived from the Xtreme 125R. It produces 11.4 bhp and 10.5 Nm of torque, paired with a five-speed gearbox.
- ONGC** Energy Centre Trust and Engineers India Ltd. have partnered to establish a Helium Recovery Demonstration Plant in Tamil Nadu, valued at Rs 39.42 crore. This plant, utilizing CSIR-IIP technology, aims to extract high-purity Helium from natural gas, addressing India's import reliance.
- Indian Oil Corporation** and Air India have partnered to promote sustainable aviation fuel (SAF), marking a significant move towards greener aviation in India. IOC will supply SAF produced from used cooking oil, starting December, at its Panipat refinery, with an annual production of 35,000 tonnes.
- Inox Wind** has sold a stake in Inox Renewable Solutions for Rs. 175 crore. The valuation of the subsidiary is Rs. 7,400 crore. This sale follows the National Company Law Tribunal's approval of the merger of Inox Wind Energy into Inox Wind. The merger aims to reduce liabilities by

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INFY	1496.20	1440.00	3.90%
TCS	3098.60	3016.20	2.73%
HINDUNILVR	2669.80	2604.80	2.50%
NESTLEIND	1190.30	1161.40	2.49%
NTPC	342.00	335.05	2.07%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
BEL	371.85	380.05	-2.16%
BAJFINANCE	887.80	902.30	-1.61%
SHRIRAMFIN	616.30	626.35	-1.60%
TATAMOTORS	689.60	700.25	-1.52%
INDUSINDBK	778.20	785.50	-0.93%

(Source: [Moneycontrol](#))

- **Lupin** announced the launch of Bosentan tablets for oral suspension, 32 mg in the United States, following approval received by its alliance partner, NATCO Pharma, from the US Food and Drug Administration (USFDA).
- **Aurobindo Pharma** has emerged as the frontrunner to acquire Prague-based generic drugmaker Zentiva for \$5-5.5 billion (Rs 43,500-47,900 crore) from Advent International, said several people aware of the matter, underscoring the growing consolidation of pharmaceutical assets in Europe.
- **Hindustan Aeronautics Ltd.** said that the company is likely to receive a big purchase order. The Cabinet Committee on Security (CCS) has approved the purchase of 97 Light Combat Aircraft (LCA) Mark1A fighter jets. The aggregate value of this order is Rs. 62,000 Crore.

approximately Rs. 2,050 crore.

- **Vedanta's** demerger plan faces a big hurdle as the Central government raises serious objections, citing concerns about potential concealment of information, inflated revenues, and undisclosed liabilities. This objection follows a warning from the markets regulator regarding non-compliance issues. The NCLT has postponed the hearing on the demerger case to September 17.
- **UltraTech Cement** aims to exceed 200 million tonnes production capacity by FY26, a year ahead of schedule, according to Chairman Kumar Mangalam Birla. The company also aspires to become the largest cement producer globally, excluding China. In fiscal 2025, UltraTech's sales volumes grew over 14% to 135.83 million tonnes, with a net revenue of Rs. 75,955 crore.
- **Thomas Cook (India)** has introduced contactless cross-border payments via Google Pay & Mastercard, addressing the growing demand for seamless international transactions. Thomas Cook's pioneering initiative with Google Pay, enables Indians to make secure overseas payments via their mobile device across accommodation, transport, dining, shopping and more. This eliminates the need to carry physical cards, reducing stress of card loss/theft, replacement hassles or need for emergency cash.
- **Indian Railway Finance Corporation** has sanctioned and executed agreements for a fresh term loan of Rs 199.70 crore with Surat Integrated Transportation Development Corporation (SITCO) for developing India's first multi-modal transport hub in Surat.
- **NTPC Green Energy** announced the commencement of commercial operations for two renewable energy projects in Gujarat.

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

## Global News

- The People's Bank of China (PBOC) maintained key lending rates at record lows for the third consecutive month during the August fixing. The one-year Loan Prime Rate was kept steady at 3.0%, while the five-year LPR, which guides mortgage rates, remained unchanged at 3.5%.
- China's fiscal revenue edged up 0.1% year-on-year to over CNY 13.58 trillion (USD 1.9 trillion) in the first seven months of the year.
- U.S. housing starts shot up by 5.2% to an annual rate of 1.428 million in July after spiking by 5.9% to an upwardly revised rate of 1.358 million in June. Building permits tumbled by 2.8% to an annual rate of 1.354 million in July after edging down by 0.1% to a downwardly revised rate of 1.393 million in June.
- U.K. annual inflation jumped to 3.8% in July 2025, up from 3.6% in June. On a monthly basis, CPI rose 0.1%, defying forecasts of a 0.1% decline but slowing from June's 0.3% gain. Core inflation inched up to 3.8% in July 2025, compared with June's figure of 3.7%. On a monthly basis, core consumer prices increased 0.2%, easing from a 0.4% rise in June.
- U.K. house price inflation rose by 3.7% in the year to June 2025, up from the revised estimate of 2.7% in the 12 months to May 2025.
- Eurozone annual inflation rate was unchanged from the prior month at 2% in July of 2025. Core inflation remained unchanged at 2.3%, its lowest level since January 2022.
- Germany's producer prices fell by 1.5% year-on-year in July 2025, following a 1.3% decline in June. On a monthly basis, the producer price index unexpectedly edged down 0.1% in July, reversing a 0.1% increase in June.
- Japan posted a merchandise trade deficit of 117.550 billion yen in July, following the downwardly revised 152.1 billion yen surplus in June (originally 153.1 billion yen). Exports were down 2.6% on year at 9.359 trillion yen, following the 0.5% decline in the previous month. Imports fell an annual 7.5% to 9.476 trillion yen, following the upwardly revised 0.3% increase a month earlier (originally 0.2%).
- Japan's value of core machinery orders were up a seasonally adjusted 3.0% on month in June - coming in at 941.2 billion yen, following the 0.6% drop in May. On a yearly basis, core machinery orders climbed 7.6% - following the 4.4% gain in the previous month.

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

## Economic News

- Crude Oil traded at US\$ 63.18/bbl (IST 17:00).
- INR weakened to Rs. 87.07 from Rs. 86.95 against each US\$ resulting in daily change of 0.14%.
- A CRISIL Intelligence report indicates that increased US tariffs will significantly impact India's MSME sector, responsible for 45% of exports. Textiles, gems, jewellery, and chemicals are expected to be the hardest hit, with MSMEs holding substantial shares in these sectors. Surat's diamond exports will face challenges, while the steel sector is likely to experience minimal impact.
- GST reforms are on the horizon. These reforms may bring a two-tier tax structure. Household goods may see lower tax rates. An SBI Research Report suggests a revenue loss of Rs 85,000 crore annually. However, consumption may increase by Rs 1.98 lakh crore. The Centre's proposal will be discussed by state finance ministers.
- India's Russian oil imports decreased in July due to reduced discounts and seasonal demand dips, with private refiners taking the majority. State refiners are shifting to Middle Eastern and U.S. supplies amid narrowed Urals discounts. Overall, Russian oil imports fell slightly in January-July, while U.S. purchases increased significantly, and Latin American imports were skipped in July.
- India's electronics exports surged to USD 38.57 billion in FY 2024-25, marking a 32.47% increase, driven by non-smartphone categories like solar panels and telecom equipment. This growth elevates electronics to 9% of India's total merchandise exports.
- The Pradhan Mantri Mudra Yojana (PMMY) scheme's NPA rate for Scheduled Commercial Banks has increased to 9.81% as of March 2025. Loans against gold jewellery have surged by 71.3% during December 2024, promoting financial inclusion, especially for rural and underserved segments. Government initiatives aim to support women borrowers and address factors influencing gold prices.
- The government has disbursed Rs 21,689 crore under Production-Linked Incentive (PLI) schemes across 12 sectors, including electronics and pharmaceuticals, as of July 31, 2025. Launched in 2021 with an outlay of Rs 1.97 lakh crore for 14 sectors, the PLI scheme has approved 806 applications, with the food products segment receiving the most approvals, followed by speciality steel and auto.

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

# Forthcoming Events

## Board Meetings as on 21/08/2025

GMR AIRPORTS LIMITED	Fund Raising
Vedanta Limited	Dividend

(Source: NSE)

## Corporate Actions as on 21/08/2025

Coal India Limited	Dividend - Rs 5.15 Per Share
Hindustan Aeronautics Limited	Dividend - Rs 15 Per Share
Honda India Power Products Limited	Interim Dividend - Rs 100 Per Share
Jullundur Motor Agency (Delhi) Limited	Dividend - Rs 2 Per Share
Kakatiya Cement Sugar & Industries Limited	Dividend - Rs 3 Per Share
Rail Vikas Nigam Limited	Dividend - Rs 1.72 Per Share
Relaxo Footwears Limited	Dividend - Rs 3 Per Share
Styrenix Performance Materials Limited	Interim Dividend - Rs 31 Per Share
Thomas Cook (India) Limited	Dividend - Re 0.45 Per Share

(Source: NSE)

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