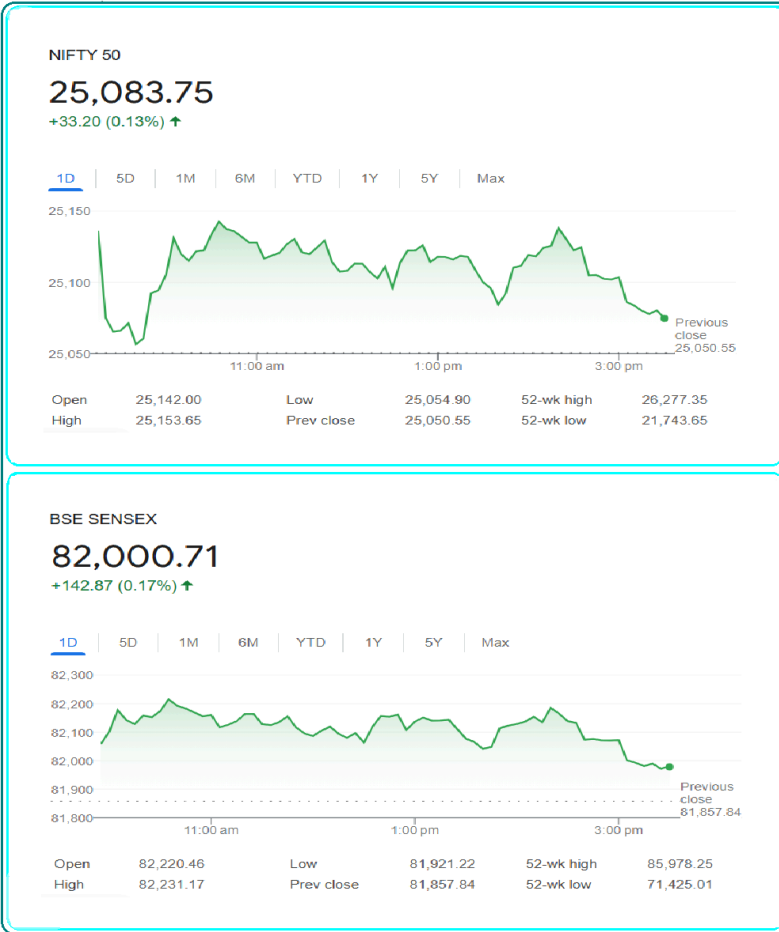


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	25083.75	25050.55	<b>0.13%</b>
<b>S&amp;P BSE SENSEX</b>	82000.71	81857.84	<b>0.17%</b>
<b>NIFTY MID100</b>	57708.95	57930.50	<b>-0.38%</b>
<b>NIFTY SML100</b>	17966.35	17968.40	<b>-0.01%</b>

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

## Market Wrap Up

- The domestic equity benchmarks ended with minor gains today, extending their winning streak to a sixth straight session. Investor optimism was boosted by the possibility of a Goods and Services Tax (GST) cut. However, caution prevailed as market participants awaited cues on interest rate policy from the upcoming US Federal Reserve annual symposium. The Nifty settled above the 25,050 mark.
- The S&P BSE Sensex advanced 142.87 points or 0.17% to 82,000.71. The Nifty 50 index added 0.13 points or 0.33.20% to 25,083.75. In the past six trading sessions, the Sensex and Nifty jumped 2.19% and 2.43%, respectively.
- The S&P BSE Mid-Cap index fell 0.12% and the S&P BSE Small-Cap index rose 0.01%. The market breadth was positive.
- Among the sectoral indices, the Nifty Pharma index (up 0.95%), the Nifty Healthcare index (up 0.93%) and the Nifty Realty index (up 0.38%) outperformed the Nifty 50 index. Meanwhile, the Nifty FMCG index (down 0.64%), the Nifty PSU Bank index (down 0.37%) and the Nifty Auto index (down 0.36%) 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 **3392** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **ICICIBANK**, **HDFCBANK**, **BAJFINANCE**.
- Short** position build up for the **August** series has been witnessed in **INFY**, **TATAMOTORS**, **ETERNAL**.
- Unwinding** position for the **August** series has been witnessed in **SBIN**, **HCLTECH**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55755.45	55698.50	0.10%
NIFTY AUTO	25377.50	25469.25	-0.36%
NIFTY FMCG	56303.05	56664.05	-0.64%
NIFTY IT	35723.90	35690.05	0.09%
NIFTY METAL	9493.65	9497.75	-0.04%
NIFTY PHARMA	22177.70	21969.50	0.95%
NIFTY REALTY	917.35	913.85	0.38%
BSE CG	67096.53	67127.01	-0.05%
BSE CD	60970.15	61114.32	-0.24%
BSE Oil & GAS	26438.40	26389.22	0.19%
BSE POWER	6592.09	6654.77	-0.94%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	42610.17	42888.55	-0.65%
HANG SENG	25104.61	25165.94	-0.24%
STRAITS TIMES	4230.90	4219.54	0.27%
SHANGHAI	3771.10	3766.21	0.13%
KOSPI	3141.74	3130.09	0.37%
JAKARTA	7890.70	7943.83	-0.67%
TAIWAN	23962.13	23625.44	1.43%
KLSE COMPOSITE	1592.87	1588.21	0.29%
ALL ORDINARIES	9284.20	9177.40	1.16%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	97000.94	96170.86
NSE F&O	170295.20	150040.84

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1246.51
NET SELL	-

(Source: [NSE](#))

## Corporate News

- UltraTech** owns 81.5% of India Cements, while the capital market regulator's rules mandate that listed companies must have at least 25% of their shares owned by the public. UltraTech will sell 6.5% of India Cements between Thursday and Friday, bringing its stake lower to 75%. It has fixed the floor price for the share sale at Rs 368 apiece, which is slightly lower than India Cements' Wednesday closing price of Rs 370 on the BSE.
- RailTel Corporation** announced that it has received two work orders worth Rs. 50.42 Crore from government institutions in Kerala and Odisha. The aggregate value of one work order received from Higher Education Department of Odisha Government is Rs. 15.42 Crore. The second order worth Rs. 34.99 Crore is received from Kerala State Information Technology Mission.
- Godrej Properties** has acquired a 7% stake in Godrej Skyline Developers (GSDL). The transaction took place for a total consideration of Rs. 9.25 Lakh.
- Transrail Lighting** has secured a significant domestic transmission line EPC order and an international product supply order totalling to Rs 837 crore.
- Fortis Healthcare** has signed a collaboration agreement with the Ekana Group for operations and management of a 550-bed greenfield super specialty hospital in Lucknow.
- JSW Steel** announced that its wholly owned subsidiary, Mivaan Steels, was declared the successful bidder on 18 August 2025, by the Ministry of Coal, Government of India, for the Rajgamar Dipside coal block auction in Chhattisgarh.
- Reliance Jio** remains the most affordable telecom operator in India, offering better data benefits at lower prices than Airtel and Vodafone Idea. Despite aligned pricing across major plans, Jio provides higher daily data limits and monthly savings of up to Rs 50. Its pricing strategy continues to cater effectively to both data-heavy and voice-only users.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
CIPLA	1592.80	1546.10	3.02%
DRREDDY	1276.60	1245.40	2.51%
BAJAJFINSV	1980.00	1958.50	1.10%
ICICIBANK	1446.00	1430.60	1.08%
SBILIFE	1877.30	1858.50	1.01%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
COALINDIA	378.15	384.70	-1.70%
BAJAJ-AUTO	8684.50	8827.50	-1.62%
TATACONSUM	1088.10	1105.30	-1.56%
POWERGRID	284.00	288.40	-1.53%
ETERNAL	321.80	326.55	-1.45%

(Source: [Moneycontrol](#))

- **Natco Pharma** has sued Danish drugmaker Novo Nordisk, maker of blockbuster weight-loss drug Wegovy (semaglutide), claiming its version of the drug does not infringe upon the device or process patent technology owned by the multinational company.

- **IndusInd Bank** has announced the signing of a memorandum of understanding (MoU) with the National Small Industries Corporation (NSIC), a Government of India enterprise under the Ministry of MSME.
- **IndiGrid** will acquire NERES XVI Power Transmission Ltd, an inter-state project in northeastern India, from Techno Electric & Engineering Company post-commissioning for up to Rs 460 crore. The project includes a substation and a 45 km transmission line, with a targeted commissioning date of December 2026.
- **Hindustan Aeronautics** said that the Cabinet Committee of Security (CCS) has approved the proposal for procurement of 97 light combat aircraft Mk-1A along with associated equipment for Indian Air Force.
- **VA Tech Wabag** announced that it has secured a Rs 46.50 crore order from RenewSys India for delivering water management solutions at its 2 GW solar cell manufacturing facility in Hyderabad, Telangana.
- **SRM Contractors** announced that it had secured new construction projects with a cumulative value of Rs 174 crore.

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

## Global News

- U.K. S&P Global Composite PMI rose to 53 in August of 2025 from 51.5 in the previous month. The manufacturing PMI slipped to 47.3 in August 2025 from 48 in July while the services PMI climbed to 53.6 in August 2025 from 51.8 in July.
- Eurozone HCOB Composite PMI rose to 51.1 in August of 2025 from 50.9 in the previous month. The manufacturing PMI rose to 50.5 in August 2025 from 49.8 in July while the services PMI eased to 50.7 in August 2025 from 51 in July.
- Germany's flash composite PMI rose to 50.9 in August from 50.6, the highest since March. The manufacturing PMI rose to 49.9 in August 2025 from 49.1 in the previous month while the services PMI eased to 50.1 in August 2025 from 50.6 in July.
- France's HCOB Flash Composite PMI rose to 49.8 in August 2025 from 48.6 in July. The manufacturing PMI rose to 49.9 in August 2025 from 48.2 in July while the services PMI rose to 49.7 in August 2025 from 48.5 in July.
- Japan S&P Global Composite PMI rose to 51.9 in August 2025 from 51.6 in July. The manufacturing PMI edged up to 49.9 in August 2025 from a final 48.9 in July while the services PMI dropped to 52.7 in August 2025 from July's 53.6.

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

## Economic News

- Crude Oil traded at US\$ 63.30/bbl (IST 17:00).
- INR weakened to Rs. 87.26 from Rs. 87.07 against each US\$ resulting in daily change of 0.22%.
- India HSBC Composite PMI jumped to a record high of 65.2 in August 2025 from a final 61.1 in the previous month. The manufacturing PMI rose to 59.8 in August 2025 from a final reading of 59.1 in July while the services PMI rose to 65.6 in August 2025 from 60.5 in July.
- Retail inflation for farm and rural workers in India saw a decrease in July 2025, dropping to 0.77% and 1.01% respectively. The All-India Consumer Price Index also experienced an increase for both Agricultural and Rural Labourers. However, food inflation contracted for both groups, indicating a decrease in food prices compared to the previous year.
- India's core sector output experienced a modest 2% growth in July, slightly below June's 2.2%.
- India and Russia plan to boost their annual trade by 50% to reach \$100 billion. Both nations seek to reduce tariffs. This comes amid rising tensions with the US. Subrahmanyam Jaishankar highlights the need to remove trade barriers. Narendra Modi and Vladimir Putin have strengthened ties. India defends its right to buy discounted Russian oil.
- The GST Council is considering exempting health and life insurance premiums for individuals, potentially leading to significant relief for consumers. This proposal, part of broader GST 2.0 reforms, aims to simplify the tax regime and boost consumption. While most states support the move, concerns remain about ensuring the benefits are passed on to customers.
- Raw tea leaf prices dropped nearly 50% year-on-year in August to Rs. 14/kg due to rising low-cost imports from Kenya and Nepal and export uncertainty. Retail tea prices also fell 10-15%. This has hurt 24 million small growers across India. Oversupply, weak exports, and softening auction prices suggest continued pressure on prices through 2025, say industry leaders.
- Modi's government plans GST tax cuts. This move may cause revenue loss for states. States and the center will negotiate revenue sharing. Some states worry about financial impact. The GST Council will discuss the proposal. The government aims for consensus before implementation. The changes may influence upcoming elections in Bihar. The government expects stronger consumption to offset losses.

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

# Forthcoming Events

## Board Meetings as on 22/08/2025

GMR Power and Urban Infra Limited

Fund Raising

(Source: NSE)

## Corporate Actions as on 22/08/2025

Godfrey Phillips India Limited	Dividend - Rs 60 Per Share
Indigo Paints Limited	Dividend - Rs 3.50 Per Share
Jindal Stainless Limited	Dividend - Rs 2 Per Share
Jindal Steel & Power Limited	Dividend - Rs 2 Per Share
LIC Housing Finance Limited	Dividend - Rs 10 Per Share
Lodha Developers Limited	Dividend - Rs 4.25 Per Share
Procter & Gamble Health Limited	Dividend - Rs 45 Per Share
The Federal Bank Limited	Dividend - Rs 1.20 Per Share
AGI Greenpac Limited	Dividend - Rs 7 Per Share
APL Apollo Tubes Limited	Dividend - Rs 5.75 Per Share
Deep Industries Limited	Dividend - Rs 3.05 Per Share
eClerx Services Limited	Dividend - Re 1 Per Share
GE Vernova T&D India Limited	Dividend - Rs 5 Per Share
Global Health Limited	Dividend - Re 0.50 Per Share
HMA Agro Industries Limited	Dividend - Re 0.30 Per Share
Indian Railway Catering And Tourism Corporation Limited	Dividend - Re 1 Per Share
Kalyani Forge Limited	Dividend - Rs 4 Per Share
Kfin Technologies Limited	Dividend - Rs 7.50 Per Share
Kuantum Papers Limited	Dividend - Rs 3 Per Share
Mayur Uniquoters Ltd	Dividend - Rs 5 Per Share
Netweb Technologies India Limited	Dividend - Rs 2.50 Per Share
Omax Autos Limited	Dividend - Rs 2.50 Per Share
Paradeep Phosphates Limited	Dividend - Re 1 Per Share
Sai Silks (Kalamandir) Limited	Dividend - Re 1 Per Share
Sarda Energy & Minerals Limited	Dividend - Rs1.50 Per Share
Sarveshwar Foods Limited	Rights 12:47 @ Premium Rs 5/-
Shree Digvijay Cement Co.Ltd	Dividend - Rs 1.50 Per Share
The Sandesh Limited	Dividend - Rs 2.50 Per Share
Thejo Engineering Limited	Dividend - Rs 5 Per Share

(Source: NSE)

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