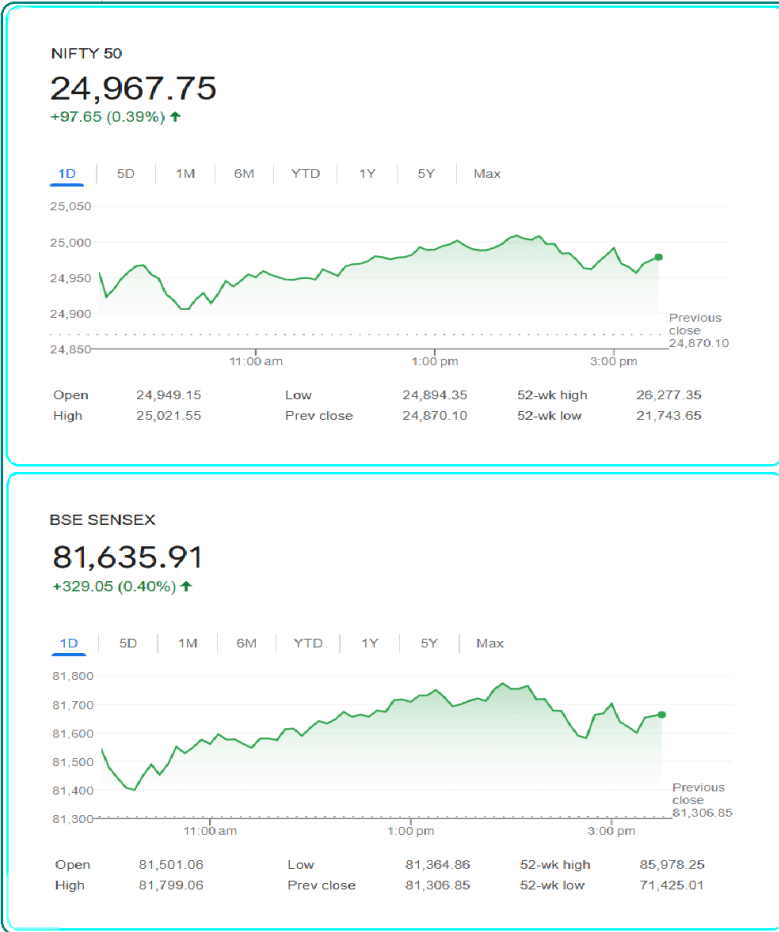


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24967.75	24870.10	<b>0.39%</b>
<b>S&amp;P BSE SENSEX</b>	81635.91	81306.85	<b>0.40%</b>
<b>NIFTY MID100</b>	57701.50	57629.75	<b>0.12%</b>
<b>NIFTY SML100</b>	17911.55	17919.50	<b>-0.04%</b>

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

## Market Wrap Up

- The headline equity benchmarks ended with decent gains today, driven by strong performance in IT stocks. Sentiment improved further after U.S. Federal Reserve Chair Jerome Powell signaled a potential interest rate cut next month. Investors are also closely tracking the upcoming manufacturing PMI, services PMI and composite PMI values scheduled for later this week. The Nifty settled above the 24,950 mark.
- The S&P BSE Sensex advanced 329.06 points or 0.40% to 81,635.91. The Nifty 50 index rose 97.65 points or 0.39% to 24,967.75.
- The S&P BSE Mid-Cap index added 0.10% and the S&P BSE Small-Cap index shed 0.02%.
- Among the sectoral indices, the Nifty IT index (up 2.37%), the Nifty Realty index (up 0.75%) and the Nifty Metal index (up 0.65%) outperformed the Nifty 50 index. Meanwhile, the Nifty Media index (down 1.67%), the Nifty PSU Bank index (down 0.25%) and the Nifty FMCG index (down 0.10%) 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 **9340** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **RELIANCE**, **LT**, **SBIN**, **HDFCBANK**, **BAJFINANCE**.
- Short** position build up for the **August** series has been witnessed in **BHARTIARTL**, **ICICIBANK**, **BAJAJFINSV**, **MARICO**.
- Unwinding** position for the **August** series has been witnessed in **INFY**, **LTIM**, **CESC**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55139.30	55149.40	-0.02%
NIFTY AUTO	25423.40	25329.45	0.37%
NIFTY FMCG	55681.65	55737.45	-0.10%
NIFTY IT	36280.05	35440.85	2.37%
NIFTY METAL	9436.75	9375.45	0.65%
NIFTY PHARMA	22362.80	22265.00	0.44%
NIFTY REALTY	916.45	909.65	0.75%
BSE CG	66871.05	67151.02	-0.42%
BSE CD	60955.22	60673.30	0.46%
BSE Oil & GAS	26245.57	26226.03	0.07%
BSE POWER	6566.00	6567.15	-0.02%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	42807.82	42633.29	0.41%
HANG SENG	25829.91	25339.14	1.94%
STRAITS TIMES	4256.49	4253.02	0.08%
SHANGHAI	3883.56	3825.76	1.51%
KOSPI	3209.86	3168.73	1.30%
JAKARTA	7926.91	7858.85	0.87%
TAIWAN	24277.38	23764.47	2.16%
KLSE COMPOSITE	1602.45	1597.47	0.31%
ALL ORDINARIES	9245.00	9234.30	0.12%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	81587.54	82241.48
NSE F&O	404951.23	325387.15

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2466.24

(Source: [NSE](#))

## Corporate News

- **Mazagon Dock Shipbuilders** said the Ministry of Defence had authorised the company to start cost negotiations with Germany's Thyssenkrupp for the Rs 70,000-crore P-75(I) submarine project.
- **Titagarh Rail Systems** said that it has received a letter of acceptance (LoA) for a Rs 91.12 crore order for the shell assembly for locomotives from the Banaras Locomotive Works.
- **NBCC Ltd** has secured a contract to develop and market a 95-acre mixed-use project in Rajasthan, with an estimated investment of around Rs 3,700 crore. The project, approved by the Rajasthan government, includes the Rajasthan Mandapam Convention Centre, GCC Tower, IT Tower, luxury hotels, and commercial and residential infrastructure on RIICO land.
- **Eris Lifesciences** announced that its Ahmedabad manufacturing facility secured approval from ANVISA, Brazil's health regulatory agency, following a successful inspection in May 2025. This clearance allows the Indian drugmaker to enter the Brazilian pharmaceutical market, the largest in South America.
- **Brookfield Asset Management** has divested a 50% stake in its Pune-based Bluegrass Business Park to 360 ONE Asset for approximately \$280 million. The Grade-A office development, spanning 2 million sq ft, includes an operational tower leased to Mastercard and another under construction.
- **GlaxoSmithKline Pharmaceuticals** has entered the oncology segment in India, introducing Jemperli and Zejula for gynaecological cancers. These therapies address unmet needs in endometrial and ovarian cancer treatment, with incidence projected to rise significantly by 2045. Jemperli offers targeted immunotherapy for advanced endometrial cancer, while Zejula provides first-line maintenance therapy for advanced ovarian cancer.
- **Apollo Hospital's** promoter Suneetha Reddy pared as much as 1.3% stake in the company. The company is part of the Nifty 50 index. The transaction took place for an aggregate amount of Rs. 1,489.3 Crore via open market

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INFY	1532.10	1487.50	3.00%
TCS	3140.60	3054.00	2.84%
HCLTECH	1504.20	1466.30	2.58%
WIPRO	253.84	248.64	2.09%
HINDALCO	715.85	704.20	1.65%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
ADANIENT	2302.90	2324.90	-0.95%
APOLLOHOSP	7851.00	7922.50	-0.90%
NESTLEIND	1153.00	1162.90	-0.85%
BEL	372.05	374.85	-0.75%
SBILIFE	1846.80	1859.00	-0.66%

(Source: [Moneycontrol](#))

- **JSW Steel** announced that it has been served with a Rs. 1,472.69 Crore demand notice from the Odisha govt for a shortfall in despatch at its Jajang iron ore block in Keonjhar. This covers the period from June 2024-June 2025.

transactions on August 22.

- **Reliance Industries Ltd** said that its step-down wholly owned subsidiary, Nauyaan Tradings Pvt. Ltd. (NTPL), has acquired the remaining 6.1% equity in Nauyaan Shipyard Pvt. Ltd. (NSPL) from Welspun Corp Ltd. (WCL). The transaction, valued at Rs. 45.32 crore, makes Nauyaan Shipyard a step-down wholly owned subsidiary of Reliance.
- **Titagarh Rail Systems Ltd** has secured a fresh order from Garden Reach Shipbuilders and Engineers Ltd. (GRSE) for building two specialised vessels valued at rs. 467.25 crore.
- **ITCONS E-Solutions** announced that it has secured an order worth Rs 49.74 lakh from the Department of Telecommunications (DoT), Ministry of Communications, Government of India, for the supply of manpower services.
- **Coal India** signed a non-binding memorandum of understanding (MoU) with the Government of Madhya Pradesh (through the Directorate of Geology and Mining) and the Madhya Pradesh State Mining Corporation.
- **GMR Power and Urban Infra** has approved a fundraising proposal upto Rs 3,000 crore via multiple instruments.

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

## Global News

- Germany's Ifo Business Climate indicator rose to 89 in August from 88.6 in July, the highest since May 2024. The expectations gauge jumped to 90.7, the highest since April 2023 from an upwardly revised 89 in the previous month. The index measuring current conditions edged up to 86.2 from 86.1.
- Singapore's annual inflation rate slowed to 0.6% in July 2025 from 0.8% in the previous month. On a monthly basis, consumer prices fell by 0.4%, the sharpest in six months, deepening from a 0.1% decline in the preceding period.

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

## Economic News

- Crude Oil traded at US\$ 64.11/bbl (IST 17:00).
- INR weakened to Rs. 87.58 from Rs. 87.52 against each US\$ resulting in daily change of 0.07%.
- India's crude oil imports fell 8.7% in July to 18.56 million tons "the lowest since February 2024" while fuel demand also dropped 4.3%. Year-on-year, crude imports declined 4.3% and product imports 12.8%. The fall may reflect U.S. tariff threats over Russian oil purchases. India plans to address U.S. trade ties openly, even as refiners resume discounted Russian oil buys.
- India's coal import increased marginally by 1.5% to 76.40 million tonnes during April-June, compared to 75.26 MT last year, despite government efforts to boost domestic production. June's coal import also saw a rise to 23.91 MT. State-owned CIL's coal production declined by 8.5% in June, attributed to monsoon-related hindrances, even as the government assures sufficient coal availability.
- The Indian government has lowered the minimum export price (MEP) for natural honey from USD 2,000 to USD 1,400 per tonne until December 31, 2025, as announced by the Directorate General of Foreign Trade. This revision, effective immediately, aims to boost exports, which reached USD 177.52 million in 2023-24, with key destinations including the US, UAE, Saudi Arabia, and Qatar.

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

# Forthcoming Events

## Board Meetings as on 26/08/2025

Sri Lotus Developers and Realty Limited	Financial Results
Ujaas Energy Limited	Bonus

(Source: NSE)

## Corporate Actions as on 26/08/2025

HDFC Bank Limited	Bonus 1:1
Vedanta Limited	Interim Dividend - Rs 16 Per Share
Emami Paper Mills Limited	Dividend - Rs 1.60 Per Share
Garware Technical Fibres Limited	Dividend - Rs 1.50 Per Share
Gillette India Limited	Dividend - Rs 47 Per Share
Jay Bharat Maruti Limited	Dividend - Rs 0.70 Per Share
Karur Vysya Bank Limited	Bonus 1:5
MAS Financial Services Limited	Dividend - Re 0.70 Per Share
SKM Egg Products Export (India) Limited	Dividend - Rs 1.50 Per Share

(Source: NSE)

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