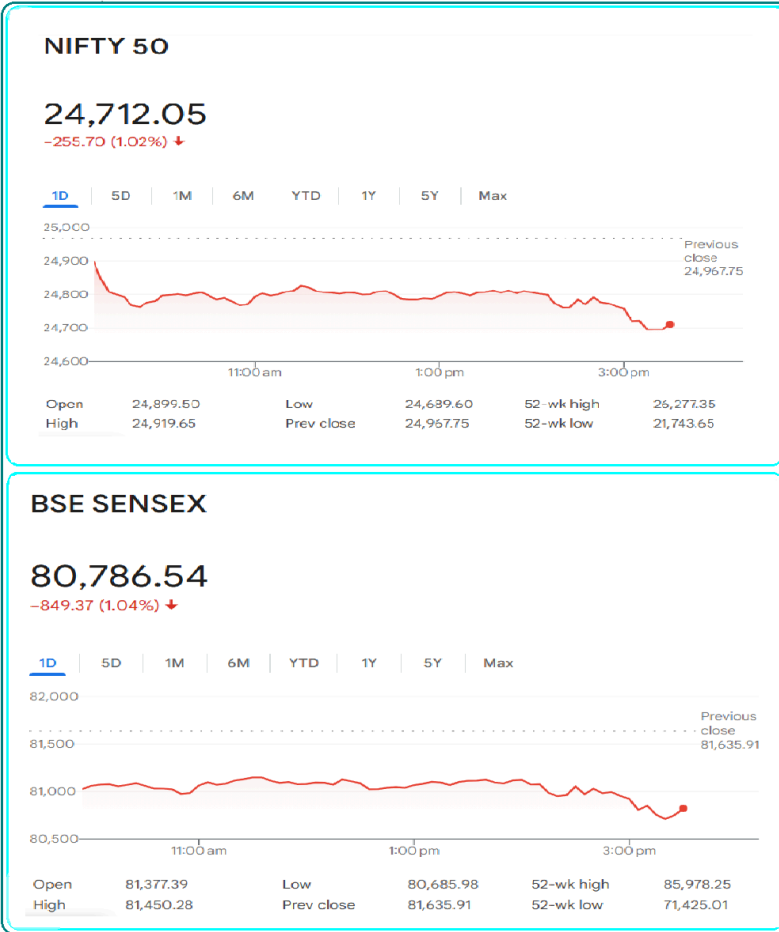


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24712.05	24967.75	-1.02%
S&P BSE SENSEX	80786.54	81635.91	-1.04%
NIFTY MID100	56766.20	57701.50	-1.62%
NIFTY SML100	17548.60	17911.55	-2.03%

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

## Market Wrap Up

- The key equity barometers ended with major cuts today, weighed down by concerns over potential U.S. trade actions. Market sentiment turned cautious after the United States issued a draft notice proposing tariffs of up to 50% on Indian goods, set to take effect from Wednesday. Additionally, foreign institutional investor (FII) selling added to the pressure. The Nifty settled below the 24,750 mark.
- The S&P BSE Sensex dropped 849.37 points or 1.04% to 80,786.54. The Nifty 50 index tumbled 255.70 points or 1.02% to 24,712.05.
- The S&P BSE Mid-Cap index fell 1.34% and the S&P BSE Small-Cap index slumped 1.68%.
- Among the sectoral indices, the Nifty FMCG index (up 0.91%), the Nifty Auto index (down 0.41%) and the Nifty IT index (down 0.60%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Realty index (down 2.24%), the Nifty Consumer Durables index (down 1.77%) and the Nifty Metal index (down 1.66%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **August** series futures witnessed an unwinding of **short** position. Open Interest has been decreased by **5901** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **ITC, TCS, MARUTI**.
- Short** position build up for the **August** series has been witnessed in **RELIANCE, ICICIBANK, HDFCBANK**.
- Unwinding** position for the **August** series has been witnessed in **SBIN, BAJFINANCE, INFY**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54450.45	55139.30	-1.25%
NIFTY AUTO	25320.30	25423.40	-0.41%
NIFTY FMCG	56187.00	55681.65	0.91%
NIFTY IT	36063.20	36280.05	-0.60%
NIFTY METAL	9280.05	9436.75	-1.66%
NIFTY PHARMA	21990.00	22362.80	-1.67%
NIFTY REALTY	895.95	916.45	-2.24%
BSE CG	65879.32	66871.05	-1.48%
BSE CD	60070.45	60955.22	-1.45%
BSE Oil & GAS	25863.96	26245.57	-1.45%
BSE POWER	6465.65	6566.00	-1.53%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	42394.40	42807.82	-0.97%
HANG SENG	25524.92	25829.91	-1.18%
STRAITS TIMES	4243.71	4256.49	-0.30%
SHANGHAI	3868.38	3883.56	-0.39%
KOSPI	3179.36	3209.86	-0.95%
JAKARTA	7905.76	7926.91	-0.27%
TAIWAN	24305.10	24277.38	0.11%
KLSE COMPOSITE	1581.59	1602.45	-1.30%
ALL ORDINARIES	9207.30	9245.00	-0.41%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	146510.86	81587.54
NSE F&O	403450.01	404951.23

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	6516.49

(Source: [NSE](#))

## Corporate News

- **Suzuki** plans a significant investment of Rs 7000 crore in India. This investment will occur over the next five to six years. The company will begin lithium-ion battery cell production for hybrid cars. Maruti Suzuki intends to export its electric SUV, the e-Vitara. The e-Vitara will be shipped to 100 countries. Production will take place at the Gujarat plant.
- **HCL Technologies** announced a global partnership with Thought Machine, a pioneer in cloud native banking technology, to accelerate the modernization of banks worldwide. The partnership aims to enable banks to rapidly transition from legacy systems and frameworks to intelligent, autonomous financial institutions powered by AI and cloud technologies.
- **InterGlobe Enterprises** and CAE are establishing a pilot training center in Mumbai to capitalize on India's booming aviation sector. Scheduled to open in early 2026, the 44,000 square-foot facility will house up to six full-flight simulators, initially featuring two Airbus A320 models. This expansion aims to address the projected demand for 20,000 new pilots in India over the next decade.
- **Bharat Petroleum Corp** plans to invest Rs. 95,000 crore in a new greenfield oil refinery and petrochemical complex near Ramayapatnam Port in Andhra Pradesh. The facility will refine 9 million tonnes of crude oil annually and expand BPCL's petrochemical portfolio. This investment aligns with India's vision of becoming a global refining and petrochemical hub.
- **JK Cement Ltd's** board has approved a significant investment of Rs 4,805 crore for a greenfield expansion project. This includes establishing a new 7 MnTPA cement line with a 4 MnTPA clinkerisation unit and a 3 MnTPA cement grinding unit in Jaisalmer, Rajasthan.
- **Protean eGov Technologies Ltd.** announced securing a work order worth about Rs. 1,160 Crore. The company said that it has received this order from the Unique Identification Authority of India (UIDAI), Government of India.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
EICHERMOT	6151.00	5990.50	2.68%
HINDUNILVR	2692.60	2631.60	2.32%
MARUTI	14714.00	14452.00	1.81%
ITC	403.35	399.35	1.00%
NESTLEIND	1162.20	1153.00	0.80%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	594.70	620.85	-4.21%
SUNPHARMA	1600.30	1656.70	-3.40%
TATASTEEL	155.03	159.63	-2.88%
BAJFINANCE	876.25	900.80	-2.73%
TRENT	5295.00	5423.00	-2.36%

(Source: [Moneycontrol](#))

- **Tata Motors** has received sanction from the National Company Law Tribunal (NCLT), Mumbai bench for its Composite Scheme of Arrangement. The Scheme includes Tata Motors, Tata Motors Passenger Vehicles Ltd, and Tata Motors Commercial Vehicles Limited along with their respective shareholders.
- **Lemon Tree Hotels** has signed a license agreement viz Lemon Tree Resort, Mhasrul, Nashik.
- **Waaree Energies** said that its wholly owned subsidiary, Waaree Solar Americas has secured a significant order for the supply of 452 megawatts (MW) of solar modules.
- **Gland Pharma** announced that it has received final approval from the United States Food and Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) for Vasopressin in 5% Dextrose injection, (0.4 Units/mL) RTU vials.
- **Aurobindo Pharma** said that its wholly owned subsidiary, CuraTeQ Biologics s.r.o, has received marketing authorisation from the UK Medicines and Healthcare Products Regulatory Agency (MHRA) for Dazublys™, its biosimilar version of trastuzumab.
- **Protean eGov Technologies** secured an order worth Rs 1,160 crore from the Unique Identification Authority of India (UIDAI) to set up Aadhaar Kendras across the country.
- **ONGC** is considering establishing a trading unit to manage the crude oil and refined fuels produced and imported by its group companies. An internal group has been created to explore the legal and logistical aspects of this plan. This unit aims to streamline the sales and procurement of approximately 100 million tonnes of oil controlled within the ONGC group.
- **Jakson Engineers** will invest over Rs 8,000 crore to establish a 6 GW integrated solar manufacturing plant in Madhya Pradesh. The project, developed in two phases, includes solar module, cell, and wafer production.

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

## Global News

- U.S. new home sales eased by 0.6% from the previous month to a seasonally adjusted annualized rate of 652,000 units in July of 2025, trimming the revised 4.1% increase in the earlier period.
- U.S. building permits decreased by 2.2% to a seasonally adjusted annualized rate of 1.362 million in June 2025.
- France's consumer confidence fell to 87 in August 2025, down from 88 in the previous three months.

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

## Economic News

- Crude Oil traded at US\$ 63.74/bbl (IST 17:00).
- INR weakened to Rs. 87.68 from Rs. 87.58 against each US\$ resulting in daily change of 0.11%.
- The Reserve Bank of India has launched the September 2025 round of its Urban and Rural Consumer Confidence Surveys to gauge households' views on the economy, jobs, income, prices and spending. Conducted quarterly across 19 cities and 31 states/UTs, the surveys capture current perceptions and one-year-ahead expectations, providing key inputs for RBI's monetary policy decisions.
- The Reserve Bank of India has initiated its September 2025 round of the Inflation Expectations Survey of Households across 19 cities to gather insights on price movements and inflation perceptions. This quarterly survey aims to understand how households perceive price changes, both generally and for specific products, providing crucial inputs for monetary policy.
- Indian labour-intensive sectors anticipate a significant export decline due to impending US tariffs. The new tariffs, effective from August 27, could impact 66% of India's exports. Textiles, gems, jewellery, and shrimp exports are particularly vulnerable. The government is urged to implement tax reforms and support schemes for MSMEs.
- India's economy likely slowed to 6.7% in April-June from 7.4% in the previous quarter, a Reuters poll showed, as weak private investment and sluggish industrial activity offset higher government spending. Capital expenditure rose 52% year-on-year, but muted consumer demand and job concerns restrained growth.
- Indian exporters are bracing for disruptions as the U.S. is set to impose a 25% tariff on Indian goods, potentially raising duties up to 50%. This action follows President Trump's response to India's increased Russian oil purchases. The government plans to assist affected exporters financially and encourage diversification to markets like China and Latin America.

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

# Forthcoming Events

## Board Meetings as on 27/08/2025

Acme Solar Holdings Limited	Fund Raising
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## Board Meetings as on 28/08/2025

DELPHI WORLD MONEY LIMITED	Fund Raising
Mufin Green Finance Limited	Fund Raising

(Source: NSE)

## Corporate Actions as on 28/08/2025

Aaa Technologies Limited	Dividend - Rs 1.50 Per Share
Procter & Gamble Hygiene and Health Care Limited	Dividend - Rs 65 Per Share
ROUTE MOBILE LIMITED	Dividend - Rs 2 Per Share

(Source: NSE)

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