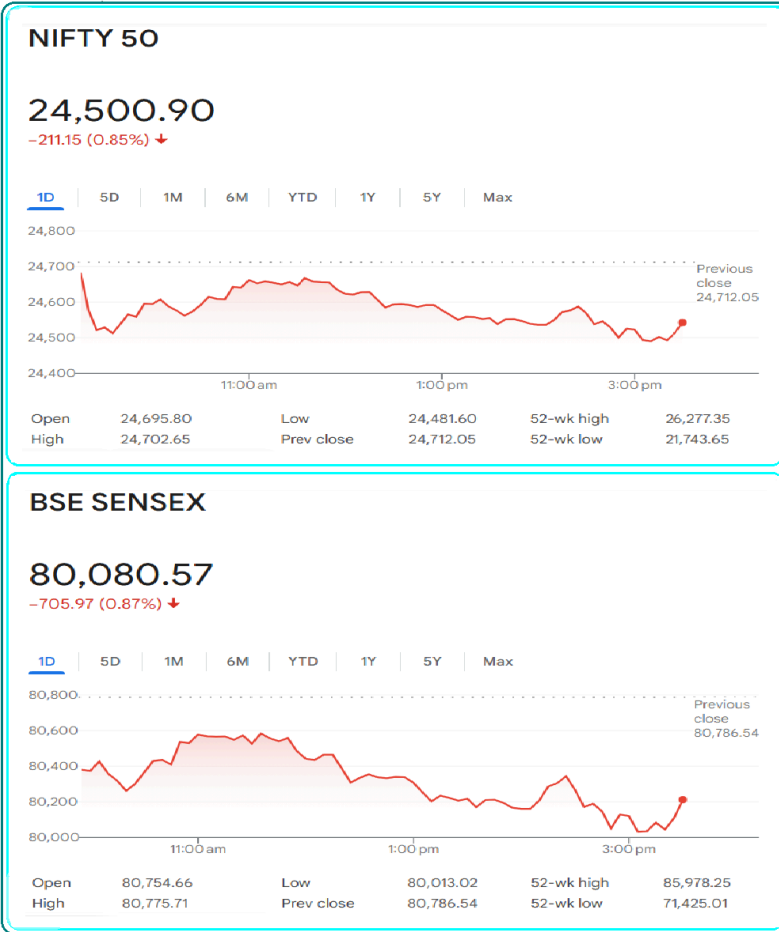


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24500.90	24712.05	-0.85%
S&P BSE SENSEX	80080.57	80786.54	-0.87%
NIFTY MID100	56047.50	56766.20	-1.27%
NIFTY SML100	17294.35	17548.60	-1.45%

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

Market Wrap Up

- The headline equity benchmarks ended with deep cuts today, marking their second straight session of losses, as fresh U.S. tariffs on Indian goods dampened investor confidence. The imposition of 25% punitive duties on key Indian exports has raised concerns over trade relations and potential economic fallout. Meanwhile, the expiry of monthly Nifty futures contracts contributed to increased volatility during the session, further weighing on market sentiment. The Nifty settled near the 24,500 mark.
- The S&P BSE Sensex slumped 705.97 points or 0.87% to 80,080.57. The Nifty 50 index tumbled 211.15 points or 0.85% to 24,500.90. The S&P BSE Mid-Cap index fell 1.09% and the S&P BSE Small-Cap index dropped 0.96%.
- Among the sectoral indices, the Nifty Consumer Durables index (up 0.56%), the Nifty Oil & Gas index (down 0.45%) and the Nifty Auto index (down 0.54%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (down 1.59%), the Nifty Realty index (down 1.50%) and the Nifty Financial Services index (down 1.20%) 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 **37999** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **RELIANCE, LT, NESTLEIND**.
- Short** position build up for the **August** series has been witnessed in **BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, BAJAJFINSV, INFY**.
- Unwinding** position for the **August** series has been witnessed in **HEROMOTOCO, LTIM**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	53820.35	54450.45	-1.16%
NIFTY AUTO	25183.50	25320.30	-0.54%
NIFTY FMCG	55612.95	56187.00	-1.02%
NIFTY IT	35488.75	36063.20	-1.59%
NIFTY METAL	9210.50	9280.05	-0.75%
NIFTY PHARMA	21808.35	21990.00	-0.83%
NIFTY REALTY	882.50	895.95	-1.50%
BSE CG	65274.23	65879.32	-0.92%
BSE CD	60432.37	60070.45	0.60%
BSE Oil & GAS	25737.34	25863.96	-0.49%
BSE POWER	6388.37	6465.65	-1.20%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	42828.79	42520.27	0.73%
HANG SENG	24998.82	25201.76	-0.81%
STRAITS TIMES	4253.78	4245.57	0.19%
SHANGHAI	3843.60	3800.35	1.14%
KOSPI	3196.32	3187.16	0.29%
JAKARTA	7952.09	7936.18	0.20%
TAIWAN	24236.45	24519.90	-1.16%
KLSE COMPOSITE	1587.07	1587.91	-0.05%
ALL ORDINARIES	9241.10	9231.10	0.11%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	102774.47	146510.86
NSE F&O	400794.80	403450.01

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	6516.49

(Source: [NSE](#))

Corporate News

- TVS Motor Company** has launched the TVS Orbiter, its new entry-level electric scooter, priced at Rs 99,900 (ex-showroom). Bookings are now open for the Orbiter, which boasts a commuter-style design, a range of 158 kilometers, and features like SmartXconnect app connectivity, cruise control, and ample storage. It is available in six variants and two color options.
- Biocon Ltd** announced that its wholly-owned unit Biocon Pharma secured a tentative approval from the United States Food and Drug Administration (US FDA) for Sitagliptin tablets. These tablets are available in 25 mg, 50 mg and 100 mg strengths.
- HCL Technologies** in collaboration with Pearson India and under the strategic advisory of MeitY Startup Hub, today announced the launch of ARISE FOR YOU™, a transformative national initiative aimed at igniting the entrepreneurial spirit among India's youth.
- Power Grid Corporation of India** said that it has won the tariff based competitive bidding (TBCB) bid to set up an inter-state transmission system for the Davanagere renewable energy integration project.
- Power Mech Projects** has secured a significant order worth Rs 370.84 crore from Mahan Energen, a subsidiary of Adani Power, for civil works at the Mahan Phase-III project in Singrauli, Madhya Pradesh. The project involves crucial infrastructure development for BTG units and related systems. The company is expected to complete the project within 30 months from the notice to proceed.
- Rail Vikas Nigam Ltd.** announced that it has formed a Joint Venture with Texmaco Rail & Engineering Ltd. to bolster India's railway modernisation and export competitiveness.
- Waaree Energies Ltd.** announced that its wholly owned subsidiary, Waaree Solar Americas, has received a fresh order for the supply of 452 megawatts (MW) of solar modules. This order has been received from a renowned United States-based developer and operator of utility-scale solar and energy storage projects.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TITAN	3637.70	3594.00	1.22%
LT	3560.10	3541.30	0.53%
COALINDIA	374.30	372.45	0.50%
HEROMOTOCO	5091.70	5073.40	0.36%
ASIANPAINT	2489.00	2481.40	0.31%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	571.65	594.70	-3.88%
HCLTECH	1449.80	1492.80	-2.88%
TCS	3093.70	3157.20	-2.01%
POWERGRID	274.45	279.90	-1.95%
INFY	1500.10	1529.60	-1.93%

(Source: [Moneycontrol](#))

- Sunsure Energy** has partnered with NTPC Vidyut Vyapar Nigam to supply 500 MWh of peak power from a battery energy storage system to Uttar Pradesh Power Corporation. The 15-year agreement involves Sunsare establishing a standalone BESS in Jhansi, delivering on-demand power during peak hours. This agreement marks a shift in India's energy storage, billing based on discharged energy.
- NLC India Limited** announced that it has successfully commissioned the first phase of a 300 MW solar power plant in Rajasthan. With this announcement, the company said that it has initiated the commercial operation of this phase of the project.
- Oil India** said that it has formed a JV with Bharat Petroleum Corporation Limited (BPCL) for development of a gas distribution network in Arunachal Pradesh. As part of agreement, the two companies shall also jointly develop CNG stations, and PNG supply to households, businesses, and industries.
- Shakti Pumps (India)** announced that following the receipt of a Letter of Empanelment from the Maharashtra State Electricity Distribution Company (MSEDCL) on 12 August 2025 for the supply and installation of 34,720 Off-Grid DC Solar Photovoltaic Water Pumping Systems (SPWPS) under the Magel Tyala Saur Krushi Pump Yojana / PM KUSUM B, the company has achieved a remarkable milestone.
- HFCL** said that its material subsidiary, HTL, has bagged a contract worth Rs 101.82 crore from the Indian Army for the supply of tactical optical fiber cables and related accessories.
- Tata Steel** announced that it has picked up stake worth Rs. 3,100 Crore in its Singapore-based subsidiary T Steel Holdings Pte Ltd. The business also informed in its filing with the bourses that it is injecting more funds into the business by subscribing to its shares.
- Shilpa Medicare** said that its wholly owned subsidiary Koanna International FZ LLC, UAE, has inked definitive agreement with Saudi-based Pharma Pharmaceutical Industries & Biological Products (PPI) to form a new joint venture company (JVC).
- Sai Life Sciences** announced the completion of Phase II of its new Production Block (PB-11) at the company's flagship API manufacturing facility in Bidar, India (Unit IV).

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

Global News

- China's industrial profits decreased 1.7% on a yearly basis in the January to July period, slightly slower than the 1.8% fall in the January to June period. In the month of July, industrial profits decreased at a slower pace of 1.5% from a year ago.
- U.S. durable goods orders slumped by 2.8% in July after plummeting by a revised 9.4% in June. Core durable goods orders jumped by 1.1% in July after rising by 0.3% in June.
- U.S. house prices fell by 0.2% in June 2025. On a yearly basis, home prices rose 2.6%, easing from a 2.9% gain in June.
- U.S. Conference Board said its consumer confidence index dipped to 97.4 in August from an upwardly revised 98.7 in July.
- Eurozone Economic Sentiment Indicator edged down 0.5 points to 95.2 in August 2025. The consumer confidence indicator eased by 0.8 points to -15.5 in August 2025, from -14.7 in July.
- Eurozone M3 money supply rose by 3.4% from the previous year to EUR 16.924 trillion in July of 2025. Bank lending to households rose by 2.4% year-on-year to EUR 7.030 trillion in July 2025. Bank lending to non-financial corporations increased by 2.8% year-on-year to EUR 5.258 trillion in July 2025, compared with 2.7% in June.
- Germany's forward-looking GfK consumer sentiment index fell to -23.6 in September from -21.7 in the previous month.

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

Economic News

- Crude Oil traded at US\$ 63.98/bbl (IST 17:00).
- INR strengthened to Rs. 87.62 from Rs. 87.68 against each US\$ resulting in daily change of 0.07%.
- India's industrial production climbed 3.5% year-over-year in July, faster than the 1.5% growth in June. During the April-July period, total industrial production advanced 2.3% compared to the corresponding period last year.
- India's gains from importing discounted Russian oil are estimated to be just USD 2.5 billion per annum, significantly lower than the previously speculated range of USD 10-25 billion.
- A GST rate cut has a higher multiplier effect than direct tax reductions, potentially boosting India's GDP growth by 20-50bps if benefits reach consumers, according to an Ambit Capital report. While income tax cuts can increase disposable income, GST's broad application makes it more impactful.
- India's personal income tax collections have surpassed corporate taxes for the first time, marking a significant shift driven by formalisation, digitisation, and improved compliance. The surge in individual income tax returns, TDS collections, and advance tax payments, coupled with GST implementation, has bolstered direct tax compliance.
- India's manufacturing sector experienced substantial growth in 2023-24, with a GVA increase of 11.9% reaching Rs. 24.6 lakh crore, a 65.5% surge from pre-pandemic levels. Basic metals led the GVA share, while food products saw the highest

employment. The sector added over 5.7 million jobs in the last decade, with Tamil Nadu leading in employment numbers.

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

Forthcoming Events

Board Meetings as on 29/08/2025

Authum Investment & Infrastructure Limited	Fund Raising
Housing & Urban Development Corporation Limited	Fund Raising
NHPC Limited	Fund Raising
RBL Bank Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 29/08/2025

Asian Hotels (East) Limited	Dividend - Re 1 Per Share
Engineers India Limited	Dividend - Rs 2 Per Share
Ganesh Housing Corporation Limited	Dividend - Rs 5 Per Share
Harsha Engineers International Limited	Dividend - Re 1 Per Share
Nitin Spinners Limited	Dividend - Rs 3 Per Share
Protean eGov Technologies Limited	Dividend - Rs 10 Per Share
Royal Orchid Hotels Limited	Dividend - Rs 2.5 Per Share
Salzer Electronics Limited	Dividend - Rs 2.50 Per Share
Vijaya Diagnostic Centre Limited	Dividend - Rs 2 Per Share
Wealth First Portfolio Managers Limited	Dividend - Rs 4 Per Share
Whirlpool of India Limited	Dividend - Rs 5 Per Share
Zee Entertainment Enterprises Limited	Dividend - Rs 2.43 Per Share

(Source: NSE)

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : helpdesk@shriraminsight.com | www.shriraminsight.com |