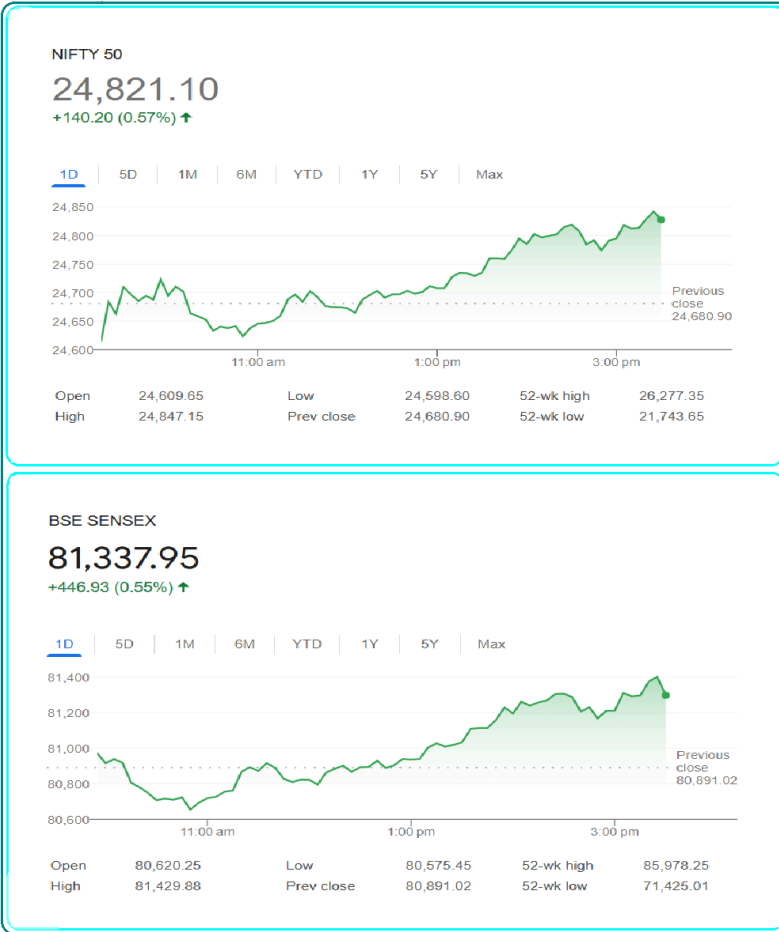


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24821.10	24680.90	0.57%
S&P BSE SENSEX	81337.95	80891.02	0.55%
NIFTY MID100	57984.85	57519.35	0.81%
NIFTY SML100	18251.45	18064.75	1.03%

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

Market Wrap Up

- The headline equity benchmarks ended with decent gains today, breaking a three-day losing streak. Investors are watching the ongoing earnings season, tariff updates, and the India-US trade deal. The Nifty closed above 24,800 level.
- The S&P BSE Sensex advanced 446.93 points or 0.55% to 81,337.95. The Nifty 50 index gained 140.20 points or 0.57% to 24,821.10.
- The S&P BSE Mid-Cap index added 0.84% and the S&P BSE Small-Cap index rallied 1.10%.
- Among the sectoral indices, the Nifty Realty index (up 1.60%), the Nifty Pharma index (up 1.37%) and the Nifty Healthcare index (up 1.26%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Bank index (up 0.24%), the Nifty Private Bank index (up 0.02%) and the Nifty IT index (up 0.01%) 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 **32402** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **SBIN**, **HDFCBANK**, **BAJFINANCE**.
- Short** position build up for the **August** series has been witnessed in **ICICIBANK**, **BAJAJFINSV**, **INFY**, **TCS**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56222.00	56084.90	0.24%
NIFTY AUTO	23888.35	23693.00	0.82%
NIFTY FMCG	54891.15	54732.95	0.29%
NIFTY IT	35373.25	35370.05	0.01%
NIFTY METAL	9409.70	9316.45	1.00%
NIFTY PHARMA	23072.45	22761.15	1.37%
NIFTY REALTY	926.50	911.90	1.60%
BSE CG	68509.50	68106.02	0.59%
BSE CD	59799.64	59394.28	0.68%
BSE Oil & GAS	27213.56	26957.97	0.95%
BSE POWER	6738.39	6686.01	0.78%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	40674.55	40998.27	-0.79%
HANG SENG	25524.45	25562.13	-0.15%
STRAITS TIMES	4229.41	4241.14	-0.28%
SHANGHAI	3609.71	3597.94	0.33%
KOSPI	3230.57	3209.52	0.66%
JAKARTA	7617.91	7614.70	0.04%
TAIWAN	23201.52	23412.98	-0.90%
KLSE COMPOSITE	1523.82	1529.38	-0.36%
ALL ORDINARIES	8966.70	8963.50	0.04%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	94794.50	92169.65
NSE F&O	385128.48	373061.33

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4636.60

(Source: [NSE](#))

Corporate News

- **Asian Paints** reported 6% decline in net profit at Rs 1,100 crore for the quarter ended June 30, 2025 as against Rs 1,170 crore a year ago. Revenue fell marginally to Rs 8,939 crore in Q1FY26 as against Rs 8,970 crore in Q1FY25.
- **GAIL (India)** posted consolidated net profit declined 25.56% to Rs 2,369.20 crore in Q1 FY26 as against Rs 3,182.93 crore in Q1 FY25. Revenue from operations (excluding excise duty) rose 1.64% year on year (YoY) to Rs 35,310.68 in Q1 FY26.
- **Indusind Bank** reported a 68.21% decline in standalone net profit to Rs 684.25 crore on 3.79% fall in total income to Rs 14,420.12 crore in Q1 FY26 over Q1 FY25.
- **Quess Corp** posted consolidated net sales at Rs 3,651.42 crore in June 2025 down 27.02% from Rs. 5,003.11 crore in June 2024. Net profit at Rs. 50.91 crore in June 2025 down 50.96% from Rs. 103.81 crore in June 2024.
- **Sobha** posted consolidated net sales at Rs 851.93 crore in June 2025 up 33.03% from Rs. 640.40 crore in June 2024. Net profit at Rs. 13.62 crore in June 2025 up 124.87% from Rs. 6.06 crore in June 2024.
- **Mahindra Lifespace Developers** posted consolidated net sales at Rs 31.97 crore in June 2025 down 83.01% from Rs. 188.14 crore in June 2024. Net profit at Rs. 51.24 crore in June 2025 up 302.83% from Rs. 12.72 crore in June 2024.
- **Central Depository Services Ltd** posted consolidated net sales at Rs 258.81 crore in June 2025 up 0.55% from Rs. 257.39 crore in June 2024. Net profit at Rs. 102.37 crore in June 2025 down 23.72% from Rs. 134.20 crore in June 2024.
- **Mazagon Dock Shipbuilders** posted consolidated net sales at Rs 2,625.59 crore in June 2025 up 11.39% from Rs. 2,357.02 crore in June 2024. Net profit at Rs. 452.15 crore in June 2025 down 35.05% from Rs. 696.10 crore in June 2024.
- **Jubilant Pharmova** posted consolidated net profit declined 78.66% to Rs 102.90 crore in the quarter ended June 2025 as against Rs 482.10 crore during the previous quarter ended June 2024. Sales rose 9.21% to Rs 1878.90 crore in the quarter ended June 2025 as against Rs

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
JIOFIN	321.10	307.35	4.47%
LT	3495.60	3422.20	2.14%
RELIANCE	1417.10	1387.60	2.13%
ASIANPAINT	2401.50	2359.60	1.78%
EICHERMOT	5470.50	5386.00	1.57%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SBILIFE	1833.40	1850.50	-0.92%
AXISBANK	1064.20	1073.60	-0.88%
TCS	3056.00	3079.30	-0.76%
HDFCLIFE	756.35	761.20	-0.64%
TITAN	3379.20	3393.00	-0.41%

(Source: [Moneycontrol](#))

- **Larsen & Toubro's** Hydrocarbon Offshore division has received a significant order. The order, valued above fifteen thousand crore rupees, comes from an entity in the Middle East. L&T will handle engineering, procurement, construction, and installation of offshore structures. Upgradation of existing facilities is also included.
- **Wipro Infrastructure Engineering** has launched Wipro Electronic Materials, a new division focused on manufacturing high-performance base materials for Printed Circuit Boards (PCBs). The company is investing approximately Rs 500 crore to establish a Copper Clad Laminate (CCL) manufacturing facility in Karnataka, creating around 350 jobs.
- **Torrent Pharmaceuticals** is gearing up to launch both oral and injectable versions of semaglutide, the weight loss drug, following the expiration of Novo Nordisk's patent. The company is currently in Phase 3 clinical trials for oral products and has partnered for injectables, anticipating a launch within the next 1-2 years.

1720.40 crore during the previous quarter ended June 2024.

- **V-Guard Industries** posted consolidated net profit declined 25.38% to Rs 73.85 crore in the quarter ended June 2025 as against Rs 98.97 crore during the previous quarter ended June 2024. Sales declined 0.75% to Rs 1466.08 crore in the quarter ended June 2025 as against Rs 1477.10 crore during the previous quarter ended June 2024.
- **Varun Beverages** reported 5% increase in consolidated net profit to Rs 1,325.49 crore in Q2 CY2025 from Rs 1,261.83 crore in Q2 CY2024. Net revenue from operations decreased by 2.5% YoY to Rs 7,017.37 crore in Q2 CY2025.
- **Strides Pharma Science** posted consolidated net profit declined 97.03% to Rs 99.61 crore in the quarter ended June 2025 as against Rs 3351.47 crore during the previous quarter ended June 2024. Sales rose 6.20% to Rs 1119.74 crore in the quarter ended June 2025 as against Rs 1054.34 crore during the previous quarter ended June 2024.
- **PCBL Chemical Ltd** has established a wholly-owned subsidiary, PCBL Chemical USA Inc, in Delaware to expand its global presence and access the North American market. This move aims to facilitate strategic market access, enhance customer proximity, and improve understanding of local regulations. The company reported a decrease in consolidated net profit for the quarter ended June 30.
- **PNC Infratech** announced that it has emerged as the L1 (first lowest) bidder for a mining services contract worth Rs 2956.66 crore from South Eastern Coalfields (SECL), Bilaspur and Chhattisgarh.
- **RailTel Corporation of India's** standalone net profit jumped 35.81% to Rs 66.10 crore in Q1 FY26, compared with Rs 48.67 crore in Q1 FY25. Revenue from operations rose 33.27% YoY to Rs 743.81 crore in Q1 FY26.

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

Global News

- China's foreign direct investment fell by 15.2% year-on-year to CNY 423.23 billion in the first half of 2025.
- Hong Kong's trade deficit widened to \$58.9 billion in June 2025 from \$55.7 billion in the same month last year. Exports rose 11.9% year-on-year to \$417.8 billion while the imports increased 11.1% to \$476.7 billion.
- Singapore's Domestic Supply Price Index dropped 3.7% year-on-year in June 2025, following a 3.9% decline in May. On a monthly basis, the index rose 0.3%, recovering from a 3.5% drop in May.

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

Economic News

- Crude Oil traded at US\$ 66.84/bbl (IST 17:00).
- INR weakened to Rs. 86.81 from Rs. 86.66 against each US\$ resulting in daily change of 0.17%.
- Digital payments in India are growing. Reserve Bank of India data shows a rise of 10.7% in digital transactions as of March 2025. The Reserve Bank of India - Digital Payments Index now stands at 493.22. This increase is due to better payment infrastructure and performance. The index measures the growth of digital payments using five parameters.
- U.S. Trade Representative Jamieson Greer said more negotiations are needed with India to reach a trade deal before the August 1 tariff deadline. While talks have been constructive, he noted India's traditionally protectionist trade policies could make major concessions difficult. Commerce Minister Piyush Goyal remains optimistic, saying no sticking points remain and immigration issues haven't been discussed.
- Gold has emerged as the fastest growing component of India's foreign exchange reserves in recent years, with the value of the yellow metal climbing more than 80% in the past 5 years. Its share in India's foreign exchange reserves climbed to 12.1% as of July 18, 2025, from 8.9% as of July 19, 2024.
- India's finished steel imports fell 28.8% in April-June due to a sharp drop in shipments from China (down 45.8%) and Japan (down 65.2%). A 12% safeguard duty curbed cheap imports. South Korea remained the top exporter. Steel exports dipped 5.1%, though shipments to Belgium rose. Domestic crude steel output rose 11.2%, while consumption increased 7.9%.

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

Forthcoming Events

Board Meetings as on 30/07/2025

Tata Steel Limited	Financial Results
InterGlobe Aviation Limited	Financial Results
BEML Land Assets Limited	Financial Results
Firstsource Solutions Limited	Financial Results
Hitachi Energy India Limited	Financial Results
Hyundai Motor India Limited	Financial Results
ADF Foods Limited	Financial Results
Asahi India Glass Limited	Financial Results
Aster DM Healthcare Limited	Financial Results
BASF India Limited	Financial Results
Birla Corporation Limited	Financial Results
CESC Limited	Financial Results
Computer Age Management Services Limited	Financial Results/Dividend
Fino Payments Bank Limited	Financial Results
GMR Power and Urban Infra Limited	Financial Results
Greaves Cotton Limited	Financial Results
Greenpanel Industries Limited	Financial Results
HEG Limited	Financial Results
IIFL Finance Limited	Financial Results
Indraprastha Gas Limited	Financial Results
Indus Towers Limited	Financial Results
ITD Cementation India Limited	Financial Results
ITI Limited	Fund Raising
JB Chemicals & Pharmaceuticals Limited	Financial Results
JBM Auto Limited	Financial Results/Fund Raising
Kaynes Technology India Limited	Financial Results
KPIT Technologies Limited	Financial Results
Maharashtra Seamless Limited	Financial Results
Mayur Uniquoters Ltd	Financial Results
MOIL Limited	Financial Results
Navin Fluorine International Limited	Financial Results
Nesco Limited	Financial Results
NHPC Limited	Fund Raising
OCCL Limited	Financial Results
Power Grid Corporation of India Limited	Financial Results
Procter & Gamble Hygiene and Health Care Limited	Financial Results

PSP Projects Limited	Financial Results
PTC India Financial Services Limited	Financial Results
Punjab National Bank	Financial Results
Redington Limited	Financial Results
Relaxo Footwears Limited	Financial Results
Shanthi Gears Limited	Financial Results
SIS LIMITED	Financial Results
Sonata Software Limited	Financial Results/Dividend
Spencer's Retail Limited	Financial Results
V2 Retail Limited	Financial Results/Fund Raising
Vedant Fashions Limited	Financial Results
Welspun Living Limited	Financial Results
Zydus Wellness Limited	Financial Results

(Source: NSE)

Corporate Actions as on 30/07/2025

BASF India Limited	Dividend - Rs 20 Per Share
EIH Limited	Dividend - Rs 1.50 Per Share
JB Chemicals & Pharmaceuticals Limited	Dividend - Rs 7 Per Share
MM Forgings Limited	Dividend - Rs 4 Per Share
NOCIL Limited	Dividend - Rs 2 Per Share
VRL Logistics Limited	Dividend - Rs 10 Per Share

(Source: NSE)

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