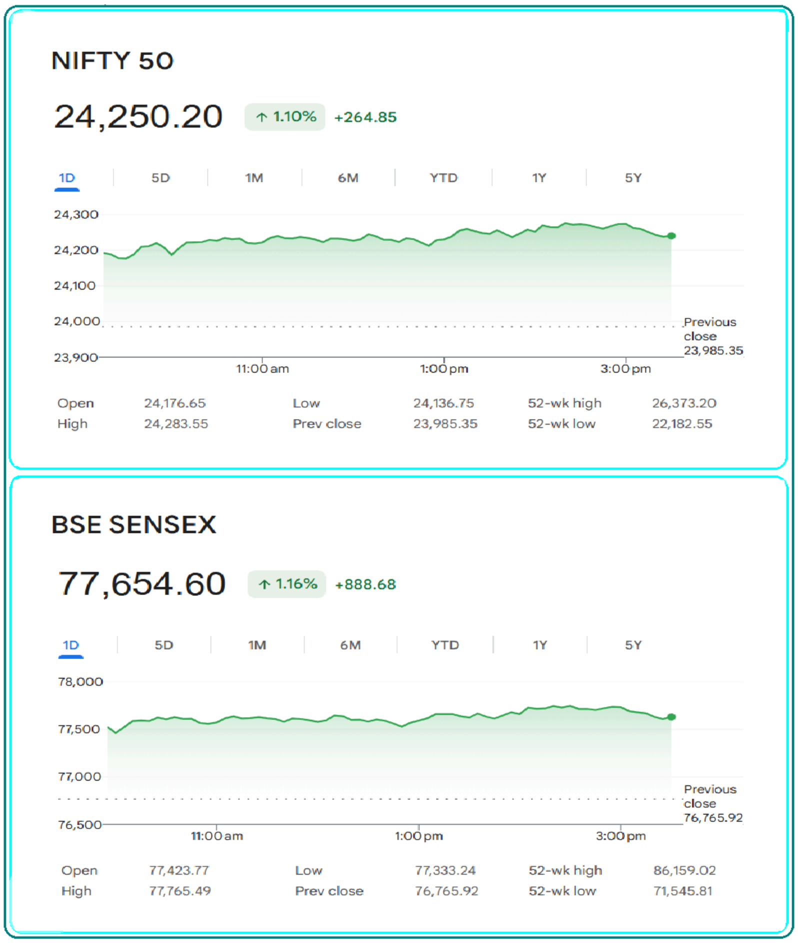
EQUITY DAILY REPORT

29th July 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24250.20	23985.35	**1.10%**
S&P BSE SENSEX	77654.60	76765.92	**1.16%**
NIFTY MID100	62862.25	62351.50	**0.82%**
NIFTY SML100	19362.35	19080.70	**1.48%**

(Source: NSE, BSE)

Market Wrap Up

- The frontline equity benchmarks ended with strong gains, supported by upbeat corporate earnings, optimism over the earnings outlook, positive global cues, continued foreign fund inflows, and investor focus on the U.S. Federal Reserve's policy decision. The Nifty 50 settled above the 24,250 mark, closing at 24,250.20.
- The S&P BSE Sensex soared 888.68 points or 1.16% to 77,654.60. The Nifty 50 index advanced 264.85 points or 1.10% to 24,250.20.
- The BSE 150 MidCap Index rose 0.78% and the BSE 250 SmallCap Index surged 1.47%.
- Among the sectoral indices, the Nifty IT index (up 2.32%), the Nifty Metal index (up 2.31%) and the Nifty FMCG index (up 1.66%) outperformed the Nifty 50 index.
- Meanwhile the Nifty Oil & Gas index (up 0.08%), Nifty Auto index (down 0.06%), and the Nifty Realty index (down 0.33%) 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 **1332** contracts at the end of the day.
- **Long** position build up for the **August** series has been witnessed in **RELIANCE**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- **Short** position build up for the **August** series has been witnessed in **BAJFINANCE**, **ADANIPORTS**.
- **Unwinding** position for the **August** series has been witnessed in **LT**, **BHARTIARTL**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57205.90	56755.60	0.79%
NIFTY AUTO	27825.95	27843.90	-0.06%
NIFTY FMCG	49690.65	48881.20	1.66%
NIFTY IT	31123.10	30418.35	2.32%
NIFTY METAL	12686.80	12400.25	2.31%
NIFTY PHARMA	26373.35	25998.85	1.44%
NIFTY REALTY	918.45	921.45	-0.33%
BSE CG	76135.34	76050.23	0.11%
BSE CD	65164.30	64390.07	1.20%
BSE Oil & GAS	26120.32	26165.25	-0.17%
BSE POWER	7570.75	7583.35	-0.17%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	61434.19	62364.92	-1.49%
HANG SENG	25807.92	25310.85	1.96%
STRAITS TIMES	5713.19	5616.11	1.73%
SHANGHAI	3828.47	3813.31	0.40%
KOSPI	5663.24	6023.66	-5.98%
JAKARTA	6091.39	6130.59	-0.64%
TAIWAN	40039.18	41603.36	-3.76%
KLSE COMPOSITE	1715.56	1712.48	0.18%
All ORDINARIES	9199.70	9112.00	0.96%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	128099.99	124665.66
NSE F&O	124545.86	320665.94

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	2981.87
NET SELL	-

(Source: NSE)

Corporate News

- **Larsen & Toubro** has reported 14% rise in consolidated net profit to Rs 4,123 crore on a 7% increase in consolidated revenues to Rs 67,942 crore in Q1 FY27 as compared with Q1 FY26.

- **Adani Ports & Special Economic Zone** posted consolidated net profit rose 9.23% to Rs 3620.40 crore in the quarter ended June 2026 as against Rs 3314.59 crore during the previous quarter ended June 2025. Sales rose 18.57% to Rs 10820.80 crore in the quarter ended June 2026 as against Rs 9126.14 crore during the previous quarter ended June 2025.

- **Colgate-Palmolive (India)** posted standalone net profit climbed 7.01% to Rs 343.08 crore on 11.96% increase in revenue from operations to Rs 1,590.56 crore in Q1 FY27 over Q1 FY26.

- **Asian Paints** posted consolidated net profit rose 39.96% to Rs 1539.25 crore in the quarter ended June 2026 as against Rs 1099.77 crore during the previous quarter ended June 2025. Sales rose 17.89% to Rs 10521.44 crore in the quarter ended June 2026 as against Rs 8924.49 crore during the previous quarter ended June 2025.

- **Garden Reach Shipbuilders & Engineers**'s standalone net profit jumped 43.82% year on year (YoY) to Rs 172.84 crore in Q1 FY27, compared with Rs 120.18 crore in Q1 FY26. Revenue from operations jumped 38.53% YoY to Rs 1,814.62 crore in Q1 FY27.

- **ERIS Lifesciences** posted consolidated net profit rose 20.68% to Rs 142.39 crore in the quarter ended June 2026 as against Rs 117.99 crore during the previous quarter ended June 2025. Sales rose 12.63% to Rs 869.03 crore in the quarter ended June 2026 as against Rs 771.56 crore during the previous quarter ended June 2025.

- **Larsen & Toubro** said that L&T Energy Hydrocarbon Onshore business has secured a 'major' engineering, procurement and construction (EPC) order from Kuwait Oil Company (KOC). The contract lies between Rs 5,000 crore and Rs 10,000 crore.

- **Bharat Heavy Electricals Ltd** has bagged an order from Nigeria's Dangote Petroleum Refinery and Petrochemicals Free Zone Enterprise for the supply and commissioning

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
JIOFIN	249.48	237.08	**5.23%**
HINDUNILVR	2117.80	2022.70	**4.70%**
INFY	1155.60	1105.70	**4.51%**
HINDALCO	962.45	936.40	**2.78%**
LT	3931.40	3832.00	**2.59%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ADANIPORTS	1719.70	1774.70	**-3.10%**
M&M	3221.80	3271.20	**-1.51%**
POWERGRID	282.85	285.30	**-0.86%**
EICHERMOT	7779.00	7836.00	**-0.73%**
BEL	387.55	389.00	**-0.37%**

(Source: Moneycontrol)

- **Biocon** received Health Canada approval for its Yesintek autoinjector. This new format offers patients a convenient treatment option for psoriasis. The autoinjector is also indicated for psoriatic arthritis and Crohn's disease. This approval strengthens Biocon's immunology product portfolio in Canada. The company aims to increase patient access to affordable medicines globally.

- **Alembic Pharmaceuticals** announced USFDA approval for its generic prucalopride tablets. The company received final approval for strengths of one and two milligrams. These tablets are indicated for treating chronic idiopathic constipation in adults. The approved drug is therapeutically equivalent to Takeda's Motegrity tablets.

- **Gland Pharma** has received approval from the U.S. Food and Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) for Sugammadex Injection.

- **Indus Towers** is launching its Africa expansion in September after securing necessary approvals. The company sees this as its largest growth opportunity outside of India. Operations will begin with an anchor customer, likely Airtel Africa, ensuring faster startup. Initial capital expenditure in Africa will be moderate and largely debt-funded. This expansion occurs alongside strong growth potential within the Indian market.

supervision of eight gas turbine generator packages.

- **ONGC** approved a $500 million parent company guarantee for its subsidiary MRPL. This guarantee facilitates crude oil imports from Saudi Aramco for two years. The move addresses concerns over India's energy security and import costs. Renewed instability in West Asia impacts vital maritime trade routes. This ensures continued crude oil supply from a key overseas supplier.

- **State Bank of India** and **HDFC Bank** are raising significant dollar funds. These large Indian banks are borrowing from foreign institutions to boost reserves. The banks aim to leverage the Reserve Bank of India's special dollar attraction facility. This move allows them to attract overseas client deposits without hedging costs. Both institutions are actively participating in the international dollar funding market.

- **Steel Authority of India** and Indonesia's Krakatau Steel will invest $350 million. A new stainless steel slab plant in Indonesia will have 500,000 tons capacity. This plant is expected to become operational within three to four years. SAIL will consume the entire output for its Salem plant in India. Finished products will primarily supply Indian customers and some exports.

- **Canara Bank** will frontload expected credit loss provisioning within two years. The bank revised its provisioning projections upward to Rs. 12-13,000 crore. This move will impact the capital adequacy ratio by sixty basis points. Canara Bank plans an Rs. 8,000 crore capital raise to cover this impact. The bank's gross advances grew eighteen percent year-on-year.

- **Hindustan Unilever** plans further price increases to combat persistent commodity inflation. The company reported a profit decline while revenue saw healthy growth. Elevated input costs continue to pressure margins across the FMCG sector. HUL passed on only half of the inflation in pricing during the June quarter. Investors reacted negatively to the earnings, sending shares down significantly.

- **ACME Solar Holdings** said it had secured Rs 3,404.57 crore in long-term project financing from Power Finance Corporation (PFC) for its 250 MW Firm and Dispatchable Renewable Energy (FDRE) project.

- **Rail Vikas Nigam** has secured an Engineering, Procurement and Construction (EPC) contract worth Rs 358.97 crore from East Central Railway.
- **Inox Wind Ltd** said it has secured a 200 MW order worth nearly Rs 1,600 crore from NLC India Ltd.

(Source: Business Standard, Economic Times, Smart investor)

Global News

- The People's Bank of China (PBoC) injected CNY 806.5 billion into the banking system through reverse repo operations on Wednesday, July 29, 2026, to maintain ample liquidity at month-end. The central bank supplied CNY 206.5 billion via seven-day reverse repos at an unchanged interest rate of 1.40%, while adding another CNY 600 billion through overnight reverse repos without disclosing the borrowing cost.
- U.S. goods trade deficit narrowed to $101.5 billion in June 2026 from a 14-month high of $105.9 billion in May.
- U.S. house price index increased 0.3% in May 2026, following a 0.1% decrease in April. On a yearly basis, home prices rose 2.2% in May, following a 2% increase in April.
- U.S. Conference Board said its consumer confidence index dipped to 90.8 in July from an upwardly revised 92.2 in June.
- U.S. wholesale inventories rose 0.3% month-over-month to $945.9 billion in June 2026, matching an upwardly revised 0.3% increase in May.
- Germany’s import prices rose 6.1% yoy in June 2026, easing from May’s 6.8%. Monthly, import prices slipped 0.7%, reversing May’s 0.7% rise.
- Australia's annual inflation rate unexpectedly eased to 3.8% in June 2026 from both May's reading. Monthly, the CPI unexpectedly edged down 0.1%.

(Source: Market Watch, RTT News, Reuters, Bloomberg)

Economic News

- Crude Oil traded at US$ 83.00/bbl (IST 17:00).
- INR strengthened to Rs. 95.65 from Rs. 95.86 against each US$ resulting in daily change of 0.22%.
- Kazakhstan's ambassador expressed keen interest in expanding business engagement with West Bengal. The nation views West Bengal as a crucial gateway to northeast India and Southeast Asia. Cooperation is sought across pharmaceuticals, mining, energy, and manufacturing sectors. A high-level business delegation will visit India in September for discussions. Kazakhstan offers a conducive environment for entrepreneurs exploring new opportunities.
- Border trade between India and China via Lipulekh Pass will resume on August 1. Twenty Indian traders will visit Purang to check preparedness and existing stock. This trade, halted in 2019 due to the pandemic, is vital for the region. Local

traders and tribal communities anticipate significant economic relief from this resumption. Necessary arrangements are now in place for this historic trade to recommence.

- Public sector firms want the RBI's forex swap facility extended by three months. This facility helps government companies hedge dollar costs for external borrowing. Banks have already mobilized over twenty billion dollars through this special swap scheme. The inflow of dollars is expected to ease pressure on the Indian rupee. This concessional hedging cost supports government companies opting for ECBs.
- The government is considering easing foreign direct investment norms for downstream investments. This move aims to boost overseas fund inflows and create new jobs. Most sectors are already open to 100 percent foreign investment under the automatic route. India has attracted significant FDI inflows between 2014-15 and 2025-26. Continuous policy reviews ensure India remains an attractive investment destination.
- The government has imposed nationwide stock limits on private sugar traders. These restrictions will be in force from August 1 to November 30. Dealers cannot hold more than 4,000 quintals of sugar at any single location. A quota of 2.25 million tonnes of sugar has been announced for August. Physical verification of stocks with sugar mills will occur during August 1-14.
- India plans to buy a quarter of its LPG imports from the United States in 2027. This move aims to reduce Middle East reliance and support trade deal efforts. State refiners will issue tenders for US LPG supplies within two months. Higher US energy purchases could help narrow India's trade surplus with Washington. Diversification of LPG imports ensures supply security and mitigates regional disruption risks.
- India's mobile subscriber base saw a slight increase in June, reaching 1282.38 million users. Bharti Airtel and Reliance Jio led net additions for core mobile subscribers. Machine-to-machine connections also grew significantly, with Bharti Airtel leading additions. Home broadband subscribers increased by 0.7 million month-on-month. Overall subscriber additions have slowed in recent months.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 30/07/2026

Tata Steel Limited	Financial Results
Mahindra & Mahindra Limited	Financial Results
Bajaj Finance Limited	Financial Results
Hyundai Motor India Limited	Financial Results
Vedanta Aluminium Metal Limited	Financial Results/Dividend
Vedanta Limited	Financial Results
LIC Housing Finance Limited	Financial Results
Mazagon Dock Shipbuilders Limited	Financial Results
Niva Bupa Health Insurance Company Limited	Financial Results/Fund Raising
Nuvama Wealth Management Limited	Financial Results/Fund Raising
Mahanagar Gas Limited	Financial Results

Mankind Pharma Limited	Financial Results
Aarti Industries Limited	Financial Results
Ajanta Pharma Limited	Financial Results/Dividend
Alivus Life Sciences Limited	Financial Results
Apollo Pipes Limited	Financial Results
AWL Agri Business Limited	Financial Results
Best Agrolife Limited	Financial Results
Burnpur Cement Limited	Financial Results
Chambal Fertilizers & Chemicals Limited	Financial Results
Data Patterns (India) Limited	Financial Results
Deepak Fertilizers and Petrochemicals Corporation Limited	Financial Results
Exide Industries Limited	Financial Results
Gillette India Limited	Financial Results
Global Health Limited	Financial Results
GNG Electronics Limited	Financial Results
Go Fashion (India) Limited	Financial Results
Gujarat Lease Financing Limited	Financial Results
Hester Biosciences Limited	Financial Results
Honda India Power Products Limited	Financial Results
ICRA Limited	Financial Results
Indegene Limited	Financial Results
India Motor Parts and Accessories Limited	Financial Results
Indian Railway Finance Corporation Limited	Financial Results
IRB Infrastructure Developers Limited	Financial Results/Dividend
JBM Auto Limited	Financial Results/Fund Raising
LT Foods Limited	Financial Results
OCCL Limited	Financial Results
Oil Country Tubular Limited	Financial Results
Pricol Limited	Financial Results
Privi Speciality Chemicals Limited	Financial Results
PSP Projects Limited	Financial Results
Quick Heal Technologies Limited	Financial Results
Railtel Corporation Of India Limited	Financial Results
Rainbow Childrens Medicare Limited	Financial Results
Satin Creditcare Network Limited	Financial Results
Siyaram Silk Mills Limited	Financial Results
Swiggy Limited	Financial Results
Thermax Limited	Financial Results
Torrent Pharmaceuticals Limited	Financial Results
Transport Corporation of India Limited	Financial Results
Ujaas Energy Limited	Financial Results
Vardhman Textiles Limited	Financial Results
Vinyl Chemicals (India) Limited	Financial Results

WESTLIFE FOODWORLD LIMITED	Financial Results/Dividend

(Source: NSE)

Corporate Actions as on 30/07/2026

UltraTech Cement Limited	Dividend - Rs 240 Per Share
Marico Limited	Dividend - Rs 4 Per Share
JK Tyre & Industries Limited	Dividend - Rs 4 Per Share
Dr. Lal Path Labs Ltd.	Interim Dividend - Rs 5 Per Share
Albert David Limited	Dividend - Rs 5 Per Share
BASF India Limited	Dividend - Rs 25 Per Share
BirlaNu Limited	Dividend - Rs 15 Per Share
Cheviot Company Limited	Dividend - Rs 25 Per Share
Dwarikesh Sugar Industries Limited	Dividend - Re 0.10 Per Share
GPT Healthcare Limited	Dividend - Rs1.50 Per Share
Granules India Limited	Dividend - Rs 1.75 Per Share
IG Petrochemicals Limited	Dividend - Rs 5 Per Share
IVP Limited	Dividend - Rs 1.50 Per Sh
Kokuyo Camlin Limited	Dividend - Re 0.30 Per Share
Share India Securities Limited	Interim Dividend - Re 0.50 Per Share

(Source: NSE)

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