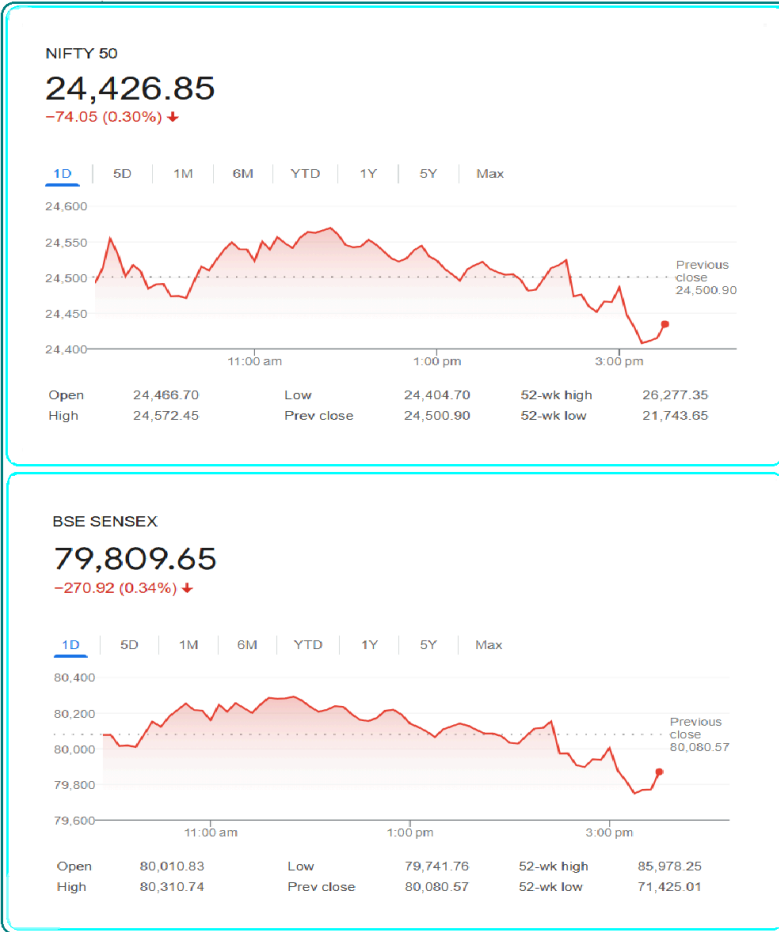


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24426.85	24500.90	<b>-0.30%</b>
<b>S&amp;P BSE SENSEX</b>	79809.65	80080.57	<b>-0.34%</b>
<b>NIFTY MID100</b>	55727.40	56047.50	<b>-0.57%</b>
<b>NIFTY SML100</b>	17227.00	17294.35	<b>-0.39%</b>

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

## Market Wrap Up

- The headline equity benchmarks ended with modest cuts today, extending losses for the third consecutive session. The weakness was attributed to fragile investor sentiment following the implementation of steep U.S. tariffs on Indian goods. The Nifty settled below the 24,450 mark.
- The S&P BSE Sensex declined 270.92 points or 0.34% to 79,809.65. The Nifty 50 index lost 74.05 points or 0.30% to 24,426.85. In three consecutive trading sessions, the Sensex slumped 2.23% and the Nifty tumbled 2.16%.
- The S&P BSE Mid-Cap index fell 0.41% and the S&P BSE Small-Cap index slipped 0.29%.
- Among the sectoral indices, the Nifty FMCG index (up 0.95%), the Nifty Media index (up 0.35%) and the Nifty Consumer Durables index (up 0.15%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Realty index (down 1.33%), the Nifty Oil & Gas index (down 1.50%) and the Nifty Auto index (down 0.88%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **September** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **8945** contracts at the end of the day.
- Long** position build up for the **September** series has been witnessed in **LT, BHARTIARTL, BAJFINANCE**.
- Short** position build up for the **September** series has been witnessed in **RELIANCE, SBIN, ICICIBANK, HDFCBANK, INFY**.
- Unwinding** position for the **September** series has been witnessed in **ITC, ETERNAL**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	53655.65	53820.35	-0.31%
NIFTY AUTO	24960.85	25183.50	-0.88%
NIFTY FMCG	56141.85	55612.95	0.95%
NIFTY IT	35181.25	35488.75	-0.87%
NIFTY METAL	9154.80	9210.50	-0.60%
NIFTY PHARMA	21804.05	21808.35	-0.02%
NIFTY REALTY	870.75	882.50	-1.33%
BSE CG	65417.08	65274.23	0.22%
BSE CD	60638.17	60432.37	0.34%
BSE Oil & GAS	25540.00	25737.34	-0.77%
BSE POWER	6392.75	6388.37	0.07%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	42718.47	42828.79	-0.26%
HANG SENG	25077.62	24998.82	0.32%
STRAITS TIMES	4269.70	4253.78	0.37%
SHANGHAI	3857.93	3843.60	0.37%
KOSPI	3186.01	3196.32	-0.32%
JAKARTA	7830.49	7952.09	-1.53%
TAIWAN	24233.10	24236.45	-0.01%
KLSE COMPOSITE	1575.12	1587.07	-0.75%
ALL ORDINARIES	9243.00	9241.10	0.02%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	90936.81	102774.47
NSE F&O	140343.93	400794.80

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	8312.66

(Source: [NSE](#))

## Corporate News

- **Tata Motors** launched 9-seater Tata Winger Plus at Rs. 20.60 lakh ex-showroom price in New Delhi. The vehicle is equipped with personal USB charging points, individual AC vents and ample leg space and other amenities to enhance passenger comfort and experience.
- **CG Power** said that its subsidiary CG Semi has introduced its first OSAT facility in Sanand, Gujarat. Hence, becoming one of India's first full-service semiconductor assembly and test providers. The company will invest ₹7,600 Crore over next five years.
- **Power Finance Corporation** and Japan Bank for International Cooperation have formalized a loan agreement of 60 billion Japanese Yen to boost clean energy initiatives in India. This collaboration, under JBIC's GREEN initiative, aims to foster sustainable development and strengthen Indo-Japanese economic relations. A portion of the loan will support Assam Bio Ethanol Pvt Ltd's innovative bio-ethanol plant.
- **Maruti Suzuki** anticipates that the proposed GST reforms, lowering the levy on small cars to 18%, will revitalize demand and boost the automotive market. Chairman RC Bhargava believes this move will benefit lower-end consumers and counter economic strain from high US tariffs. He also advocated for parity in GST between electric and hybrid cars to encourage cleaner technologies.
- **NALCO**, through joint venture KABIL, has acquired five mines in Argentina and completed non-invasive exploration. The company will now begin detailed invasive exploration to assess lithium deposits, which could take up to two years.
- **Adani Power** has secured a Letter of Award from Bihar State Power Generation Company Ltd. to supply electricity for 25 years. The company will invest USD 3 billion to establish a 2,400 MW ultra-supercritical power plant in Bhagalpur district, Bihar. This project aims to meet India's growing power demand and generate employment opportunities.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ITC	409.75	400.90	2.21%
BEL	369.40	363.85	1.53%
SHRIRAMFIN	580.25	571.65	1.50%
TRENT	5298.00	5235.50	1.19%
ASIANPAINT	2518.60	2489.00	1.19%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
M&M	3199.50	3295.30	-2.91%
RELIANCE	1357.20	1385.90	-2.07%
INFY	1469.60	1500.10	-2.03%
APOLLOHOSP	7610.00	7728.00	-1.53%
ADANIENT	2244.70	2275.20	-1.34%

(Source: [Moneycontrol](#))

- **Infosys** has entered into a strategic pact with Mastercard to improve cross-border payments by implementing Mastercard Move along with Infosys Finacle. Hence, providing faster access to payment solutions across 200 countries and 150 currencies.
- **Tata Consultancy Services** said that it has entered into a strategic partnership with Unilab, Inc., to modernize the latter's core business systems through a comprehensive cloud migration initiative.

- **Adani** Digital, Semolina Kitchens and Encalm Hospitality have announced the discontinuation of airport lounge services with industry major Dreamfolks. The decision is said to impact company's operations and financial performance.
- **National Aluminium Company Limited** is set to invest Rs. 30,000 crore in the next five years to expand its capacity, focusing on smelting and power generation.
- **NTPC** has approved a partial modification in the transfer of its coal mining business to subsidiary NTPC Mining Ltd (NML). The company plans to move this business under an amended BTA by September 30, 2025. This business has contributed about Rs. 7,735.54 Crore in revenue. The consideration has been fixed as Rs. 10,503.27 Crore, payable in various phases.
- **ABB India** announced that it has secured an order worth Rs 173.55 crore from Siemens Gamesa Renewable Power, Chennai, for the supply of 3.X wind turbine converters and electrical cabinets.
- **Airtel** announced special measures to support users in Jammu & Kashmir, Ladakh, and Himachal Pradesh due to telecom service disruptions caused by unprecedented rains and extreme weather. Prepaid customers with expiring plans will receive a 3-day extension with unlimited calls and 1GB data per day.

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

## Global News

- U.S. initial jobless claims dipped to 229,000 in the week ended August 23rd, a decrease of 5,000 from the previous week's revised level of 234,000. Continuing claims fell by 7,000 to 1.954 million in the week ended August 16th.
- U.S. real gross domestic product shot up by 3.3% in the second quarter compared to the previously reported 3.0% surge.
- U.S. pending home sales index decreased by 0.4% to 71.7 in July after sliding by 0.8% to 72.0 in June.
- Germany's seasonally adjusted unemployment rate was unchanged from the previous month at 6.3% in August of 2025. The number of unemployed people fell by 9,000 from the downwardly revised value on previous month to 2.957 million.
- Germany's retail sales shrank 1.5% month-over-month in July 2025, reversing a 1.0% gain in the previous month. On an

annual basis, retail sales grew 1.9%, down sharply from a 4.9% rise in June.

- Germany's import prices fell by 1.4% yoy in July 2025, matching the decline seen in June. Monthly, import prices fell 0.4% in July, following no change in June.
- France's economy grew 0.3% qoq in Q2 2025, in line with preliminary estimates, picking up from 0.1% in Q1. Year-on-year, GDP rose 0.8%, faster than Q1's 0.6% growth.
- France's annual inflation rate eased to 0.9% in August 2025, steady at July's 1%. On a monthly basis, consumer prices rose 0.4%, accelerating from a 0.2% gain in July.
- France's producer prices increased by 0.4% month-on-month in July 2025, rebounding from a downwardly revised 0.1% fall in the previous month. On an annual basis, producer prices rose by 0.4% in July, slightly up from a revised 0.3% increase in June.
- France's private payroll employment rose by 0.2%, or 43,400 jobs to 21.03 million in the second quarter of 2025, rebounding slightly from a 0.1% fall in the first quarter.
- Japan's unemployment rate came in at a seasonally adjusted 2.3% in July, which would have been unchanged from the June reading.
- Japan's value of retail sales were up a seasonally adjusted 0.3% on month in July - coming in at 13.335 trillion yen. That was following the downwardly revised 1.9% gain in June (originally 2.0%). On a yearly basis, retail sales slumped 1.6% after gaining 0.9% in the previous month.
- Japan's industrial production was down a seasonally adjusted 1.6% on month in July, following the 2.1% increase in June. On a yearly basis, industrial production was down 0.9%.

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

## Economic News

- Crude Oil traded at US\$ 64.12/bbl (IST 17:00).
- INR weakened to Rs. 88.20 from Rs. 87.62 against each US\$ resulting in daily change of 0.66%.
- India's shrimp exports are projected to decline significantly due to increased US import tariffs, impacting revenues and profit margins. Exporters are exploring alternative markets like the UK, China, and Russia to mitigate losses. This situation will discourage investment in shrimp culture, further straining the financial health of exporters heavily reliant on the US market, leading to potential credit profile pressures.
- Commerce and Industry Minister Piyush Goyal announced that a Free Trade Agreement with Oman will be finalized soon, with Qatar and Saudi Arabia also expressing interest in similar agreements. He assured exporters of government support amidst global uncertainties and highlighted efforts to diversify exports. Goyal also noted progress in FTA talks with the European Union.
- China said improving ties with India is in both nations' interest, noting steps taken since the Xi-Modi meeting to stabilise relations. Bloomberg reported Beijing's outreach earlier this year, with India responding more seriously in June amid US

tariff tensions. Recent moves, including border talks, fertilizer trade, and visa relaxations, signal a thaw, though mistrust and geopolitical frictions remain.

- Gross foreign direct investment (FDI) to India remained strong during the May June period. Net foreign direct investment (FDI) fell 52% year on year to \$1 billion in June, from \$2.2 billion same time last year. Gross investments stood at \$9.2 billion in June, versus \$7 billion in May.
- The government reports success with the Pradhan Mantri Jan Dhan Yojana. Linking accounts to mobile and Aadhaar prevents subsidy diversion. Over 560 million accounts opened since 2014 with Rs. 2.68 lakh crore deposited. Nirmala Sitharaman highlights the scheme's role in direct benefit transfer and financial inclusion. A significant portion of accounts are in rural areas and held by women.

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

## Forthcoming Events

### Board Meetings as on 30/08/2025

Genus Power Infrastructures Limited	Dividend
Hubtown Limited	Fund Raising

### Board Meetings as on 31/08/2025

Parsvnath Developers Limited	Financial Results/Dividend
------------------------------	----------------------------

### Board Meetings as on 01/09/2025

Highway Infrastructure Limited	Financial Results
Unicommerce Esolutions Limited	Fund Raising
Websol Energy System Limited	Stock Split

(Source: NSE)

### Corporate Actions as on 01/09/2025

Alivus Life Sciences Limited	Dividend - Rs 5 Per Share
Triveni Engineering & Industries Limited	Dividend - Rs 2.50 Per Share
Triveni Turbine Limited	Dividend - Rs 2 Per Share

(Source: NSE)

## DISCLAIMER

This document has been prepared by Shriram Insight Share Brokers Ltd. and is meant for sole use by the recipient and not for circulation. This document is not to be reported or copied or made available to others. The information contained herein is from sources believed reliable. It should not be considered as an offer to sell or a solicitation to buy any security or as an official confirmation of any transaction. We do not represent that it is accurate or complete and it should not be relied upon as such. This document is prepared for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The investments discussed or recommended in this report may not be suitable for all investors. Shriram Insight Share Brokers Ltd. Stock Recommendation Service is a general recommendation service and is not to be construed as an individual investor-specific Portfolio Management and Advisory Service.

The user assumes the entire risk of any use made of this information. Each recipient of this document should arrive at an independent evaluation of an investment in the securities of companies referred to in this document and should consult their own advisors to determine the merits and risks of such an investment.

Shriram Insight Share Brokers Ltd. shall not be responsible for any loss or liability incurred to the user as a consequence of his or any other person on his behalf taking any investment decisions based on the information, recommendations, research reports, analysis, quotes, etc. provided on the web site.

Shriram Insight Share Brokers Ltd shall not be liable for errors, omissions or typographical errors, disruption delay, interruption, failure, deletion or defect of/in the Service provided by it.

All Users of the Service in countries other than India understand that by using the Service, they may be violating the local laws in such countries. If the User chooses to access the Service from outside India, he shall be responsible for compliance with foreign and local laws.

**EQUITIES | DERIVATIVES | COMMODITIES | DP SERVICES | MUTUAL FUNDS | RESEARCH**

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](mailto:helpdesk@shriraminsight.com) | [www.shriraminsight.com](http://www.shriraminsight.com) |