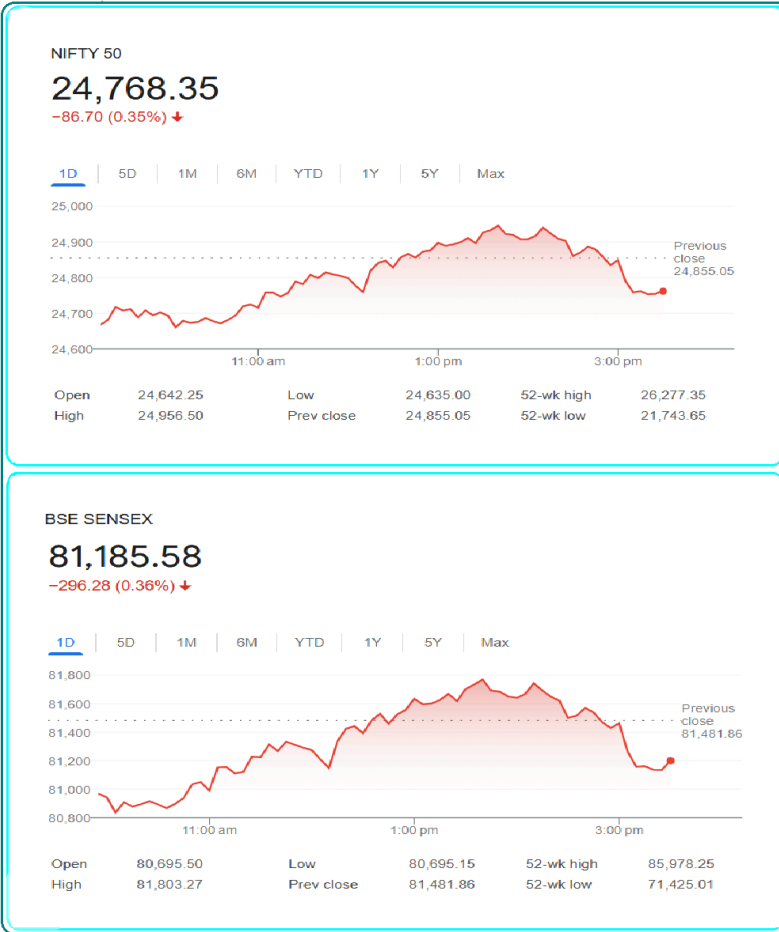


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24768.35	24855.05	-0.35%
S&P BSE SENSEX	81185.58	81481.86	-0.36%
NIFTY MID100	57400.55	57942.25	-0.93%
NIFTY SML100	17966.85	18156.85	-1.05%

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

Market Wrap Up

- The headline equity benchmarks ended with limited losses today, snapping a two-day winning streak. The decline was triggered by a sell-off following U.S. President Donald Trump's announcement of a 25% tariff on Indian goods, effective August 1, along with an additional, unspecified penalty related to India's purchases from Russia. Trading was volatile due to the weekly Nifty50 F&O series expiry.
- The S&P BSE Sensex declined 296.28 points or 0.36% to 81,185.58. The Nifty 50 index lost 86.70 points or 0.35% to 24,768.35.
- The S&P BSE Mid-Cap index slipped 0.70% and the S&P BSE Small-Cap index declined 0.85%.
- Among the sectoral indices, the Nifty FMCG index (up 1.44%), the Nifty Media index (up 0.10%) and the Nifty Private Bank index (down 0.13%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Oil & Gas index (down 1.48%), the Nifty Metal index (down 1.22%) and the Nifty Healthcare index (down 1.07%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **August** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **39804** contracts at the end of the day.
- Long** position build up for the **August** series has been witnessed in **ITC, GODREJCP, BRITANNIA**.
- Short** position build up for the **August** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, HDFCBANK, BAJFINANCE, INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56150.70	56222.00	-0.13%
NIFTY AUTO	23745.80	23888.35	-0.60%
NIFTY FMCG	55020.40	54891.15	0.24%
NIFTY IT	35481.70	35373.25	0.31%
NIFTY METAL	9399.75	9409.70	-0.11%
NIFTY PHARMA	23073.90	23072.45	0.01%
NIFTY REALTY	917.65	926.50	-0.96%
BSE CG	68692.77	68509.50	0.27%
BSE CD	59938.03	59799.64	0.23%
BSE Oil & GAS	27196.68	27213.56	-0.06%
BSE POWER	6739.59	6738.39	0.02%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	41069.82	40654.70	1.02%
HANG SENG	24773.33	25176.93	-1.60%
STRAITS TIMES	4173.77	4219.41	-1.08%
SHANGHAI	3573.21	3615.72	-1.18%
KOSPI	3245.44	3254.47	-0.28%
JAKARTA	7484.34	7549.89	-0.87%
TAIWAN	23542.52	23461.72	0.34%
KLSE COMPOSITE	1513.25	1524.50	-0.74%
ALL ORDINARIES	8999.00	9015.40	-0.18%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	107992.32	89523.19
NSE F&O	403265.11	350277.72

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	5588.91

(Source: [NSE](#))

Corporate News

- **Tata Steel** posted consolidated net sales at Rs 53,178.12 crore in June 2025 down 2.91% from Rs. 54,771.39 crore in June 2024. Net profit at Rs. 2,077.68 crore in June 2025 up 116.51% from Rs. 959.61 crore in June 2024.
- **Mahindra & Mahindra** announced a 24% year-on-year growth in its Q1FY26 consolidated net profit at Rs.4,083 Crore. In the same quarter of previous year, the business logged a net profit of Rs.3,283 Crore. Revenue came in at Rs.45,436 Crore. In the previous corresponding quarter, this was 23% higher on a year-on-year basis against Rs.37,010 Crore.
- **TVS Motor Company** posted consolidated net profit rose 32.36% to Rs 610.04 crore in the quarter ended June 2025 as against Rs 460.88 crore during the previous quarter ended June 2024. Sales rose 18.38% to Rs 12210.05 crore in the quarter ended June 2025 as against Rs 10314.47 crore during the previous quarter ended June 2024.
- **Hindustan Unilever** posted a 7.6% year-on-year (YoY) increase in standalone net profit to Rs.2,732 Crore. In the same quarter of previous year, the business posted a net profit of Rs.2,538 Crore. Revenue registered a growth of 3.80% to Rs.15,747 Crore. In the same quarter of previous year, the business logged revenue of Rs.15,166 Crore.
- **Ambuja Cements** reported a net profit of Rs 788 crore for the first quarter of the financial year 2026. This marks an on-year increase of more than 23% from the Rs 640 crore net profit reported in the same period last year. Revenue rose over 23% to Rs 10,244 crore in Q1 FY26. The cement company had earlier reported revenue from operations at Rs 8,292 crore in Q1 FY25.
- **Emami** posted consolidated net profit rose 7.61% to Rs 164.26 crore in the quarter ended June 2025 as against Rs 152.64 crore during the previous quarter ended June 2024. Sales declined 0.22% to Rs 904.09 crore in the quarter ended June 2025 as against Rs 906.07 crore during the previous quarter ended June 2024.
- **HEG** posted consolidated net profit surged 354.99% to Rs 104.83 crore on 7.96% increase in revenue from operations to Rs 616.93 crore in Q1 FY26 over Q1 FY25.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HINDUNILVR	2521.20	2437.40	3.44%
JIOFIN	329.25	320.30	2.79%
ETERNAL	307.80	303.45	1.43%
ITC	411.95	407.60	1.07%
JSWSTEEL	1048.30	1037.90	1.00%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ADANIENT	2430.70	2532.90	-4.03%
TATASTEEL	157.94	161.36	-2.12%
DRREDDY	1270.30	1292.10	-1.69%
SUNPHARMA	1706.70	1733.80	-1.56%
ADANIPTS	1373.10	1394.00	-1.50%

(Source: [Moneycontrol](#))

- **Indraprastha Gas** posted consolidated net sales at Rs 3,914.00 crore in June 2025 up 11.17% from Rs. 3,520.60 crore in June 2024. Net profit at Rs. 429.05 crore in June 2025 down 10.84% from Rs. 481.20 crore in June 2024.
- **Sonata Software** posted consolidated net sales at Rs 2,965.18 crore in June 2025 up 17.32% from Rs. 2,527.43 crore in June 2024. Net profit at Rs. 109.34 crore in June 2025 up 3.51% from Rs. 105.63 crore in June 2024.
- **JB Chemicals and Pharmaceuticals** posted consolidated net sales at Rs 1,093.94 crore in June 2025 up 8.91% from Rs. 1,004.40 crore in June 2024. Net profit at Rs. 202.38 crore in June 2025 up 14.45% from Rs. 176.83 crore in June 2024.
- **Thomas Cook (India)** posted consolidated net sales at Rs 2,407.96 crore in June 2025 up 14.34% from Rs. 2,105.94 crore in June 2024. Net profit at Rs. 72.05 crore in June 2025 down 4.3% from Rs. 75.29 crore in June 2024.
- **ABB India** has implemented a system for THINK Gas. This system automates and digitalizes THINK Gas's city gas distribution network. The network spans 10 Indian states. ABB's cloud-based platform centralizes operations. It provides real-time visibility from Chennai. The system monitors and controls gas distribution. It supplies Compressed Natural Gas to over 500 fuel stations.
- **Bharat Forge Ltd** has signed a contract with Pratt & Whitney Canada to establish a new ring mill for aerospace applications, expected to be operational by 2026. This facility will produce high-performance aerospace products, contributing to India's vision of becoming a global aerospace manufacturing hub. The collaboration reinforces commitment to the global aerospace ecosystem and advances India's manufacturing capabilities.
- **Maruti Suzuki India** has broadened its business scope beyond automobile manufacturing, as approved by its board on July 31, 2025. The company plans to venture into drones, UAVs, and mobility services, including vehicle leasing, EV charging, and used car sales. These changes, reflecting a push towards emerging mobility solutions, will be presented to shareholders at the upcoming AGM.
- **Tata Motors** offer is aimed at acquiring 100% of Iveco's common shares with a subsequent delisting of Iveco Group from the Euronext Milan stock exchange. The all-cash offer valued Iveco at about Rs 3.8 billion (\$4.4 billion). Both companies believe that having Iveco operate as a wholly-owned unit of the Mumbai-based automaker is crucial for its sustainable success and long-term value creation. Iveco has a diversified business with 74% of revenues from Europe and the rest from South America, Africa, and Oceania.

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

Global News

- China NBS manufacturing sector continued to contract in July, with a manufacturing PMI score of 49.3, unchanged from the June reading. The non-manufacturing PMI came in at 50.1, down from 50.3 in the previous month. The composite index had a score of 50.2, down from 50.7 a month earlier.
- The Federal Reserve decided to maintain the target range for the federal funds rate at 4.25 to 4.50%.
- U.S. real gross domestic product surged by 3.0% in the second quarter after falling by 0.5% in the first quarter.
- U.S. private sector employment jumped by 104,000 jobs in July after slipping by a revised 23,000 jobs in June.
- U.S. pending home sales index slid by 0.8% to 72.0 in June after jumping by 1.8% to 72.6 in May.
- Eurozone unemployment rate held steady at a record low of 6.2% in June 2025, unchanged from May's revised figure.
- Germany's seasonally adjusted unemployment rate held steady at 6.3% in June. The number of unemployed rose by 2,000 to 2.97 million.
- Germany's import prices fell by 1.4% year-on-year in June 2025, following a 1.1% decline in May. On a monthly basis, import prices were unchanged, following a 0.7% drop in May.
- France's annual inflation rate held steady at 1% in July 2025, unchanged from June. On a monthly basis, consumer prices increased by 0.2% in July, following a 0.4% gain in June.
- France's producer prices fell by 0.2% month-over-month in June 2025, easing from an upwardly revised 0.9% decline in the previous month. On a yearly basis, producer prices rose by 0.2% in June, following a downwardly revised flat reading in the preceding month.
- The Bank of Japan maintained its interest rate at around 0.5%. Previously, the bank had raised the benchmark rate to the current level from 0.25% in January.
- Japan's value of retail sales were up 2.0% on year in June - coming in at 12.966 trillion yen. That was following the downwardly revised 1.9% gain in May (originally 2.2%). For the second quarter of 2025, retail sales rose an annual 2.4% to 38.679 trillion yen.
- Japan's industrial production was up a seasonally adjusted 1.7% on month in June, following the 0.1% contraction in May. On a yearly basis, industrial production was up 4.0%.
- Australia's retail sales were up a seasonally adjusted 1.2% on month in June - coming in at A\$37.906 billion, following the downwardly revised 0.1% increase in May (originally 0.2%). Sales were up 4.9% on year.

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

Economic News

- Crude Oil traded at US\$ 69.50/bbl (IST 17:00).
- INR weakened to Rs. 87.60 from Rs. 87.43 against each US\$ resulting in daily change of 0.19%.
- U.S. President Donald Trump announced a 25% tariff on exports from India starting August 1, along with an unspecified penalty to be imposed for India's defence and energy procurements from Russia. This may have a significant adverse impact on India's shipments to its largest market that accounts for about a fifth of its exports.
- Indian vegetable oil importers are increasing palm oil purchases in anticipation of higher demand during the festival season, driven by declining global prices and a recent import duty reduction. The IVPA highlights that this shift is facilitated by palm oil's renewed cost competitiveness, even as biofuel mandates in countries like Indonesia impact global edible oil supplies.
- The India-UK Comprehensive Economic Trade Agreement (CETA) is expected to boost India's technical textile exports to the UK to \$1 billion by 2030, from the current \$240 million. The agreement grants 100% duty-free access for Indian exports, giving India a competitive advantage over China. MATEXIL will provide support to help Indian exporters capitalize on the opportunities.
- The Reserve Bank of India is expected to maintain its stance on liquidity management. It will likely avoid reintroducing fixed-rate lending to banks. Banks have requested this facility to manage their funding needs better. The RBI prefers variable rate operations. A revised liquidity management framework may be unveiled on August 6.
- Gold demand surged 3% globally in Q2 2025, driven by strong investment flows amid geopolitical uncertainty and price momentum. Gold ETFs saw significant inflows, particularly from Asian funds, reaching a first-half record. Bar and coin investment also rose, led by Chinese investors. Central banks continued buying gold, while jewellery demand declined.

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

Forthcoming Events

Board Meetings as on 01/08/2025

ITC Limited	Financial Results
UPL Limited	Financial Results
LIC Housing Finance Limited	Financial Results
Tata Power Company Limited	Financial Results
Adani Power Limited	Financial Results/Stock Split
GlaxoSmithKline Pharmaceuticals Limited	Financial Results
Godrej Properties Limited	Financial Results
Jay Bharat Maruti Limited	Financial Results
JK Lakshmi Cement Limited	Financial Results
Baazar Style Retail Limited	Financial Results
Capri Global Capital Limited	Financial Results
Century Enka Limited	Financial Results
Delhivery Limited	Financial Results
Dhanuka Agritech Limited	Financial Results
G R Infraprojects Limited	Financial Results
Go Fashion (India) Limited	Financial Results
Graphite India Limited	Financial Results
Healthcare Global Enterprises Limited	Financial Results
Honeywell Automation India Limited	Financial Results
Lyka Labs Limited	Financial Results
Narayana Hrudayalaya Ltd.	Financial Results/Fund Raising
PC Jeweller Limited	Financial Results
Procter & Gamble Health Limited	Financial Results
Ramkrishna Forgings Limited	Financial Results
RPSG VENTURES LIMITED	Financial Results
Safari Industries (India) Limited	Financial Results
Shakti Pumps (India) Limited	Financial Results
Shriram Pistons & Rings Limited	Financial Results
Steel Strips Wheels Limited	Financial Results
Symphony Limited	Financial Results/Dividend
Taj GVK Hotels & Resorts Limited	Financial Results
Transformers And Rectifiers (India) Limited	Financial Results
Tube Investments of India Limited	Financial Results
Venus Remedies Limited	Financial Results

(Source: NSE)

Corporate Actions as on 01/08/2025

Eicher Motors Limited	Dividend - Rs 70 Per Share
Maruti Suzuki India Limited	Dividend - Rs 135 Per Share
Bata India Limited	Dividend - Rs 9 Per Share
Bharat Heavy Electricals Limited	Dividend - Re 0.50 Per Share
PNB Housing Finance Limited	Dividend - Rs 5 Per Share
United Spirits Limited	Dividend - Rs 8 Per Share
Amara Raja Energy & Mobility Limited	Dividend - Rs 5.20 Per Share
Arkade Developers Limited	Interim Dividend - Re 1 Per Share
Balaji Amines Limited	Dividend - Rs 11 Per Share
Cello World Limited	Dividend - Rs 1.50 Per Share
Chennai Petroleum Corporation Limited	Dividend - Rs 5 Per Share
Cholamandalam Financial Holdings Limited	Dividend - Rs 1.30 Per Share
City Union Bank Limited	Dividend - Rs 2 Per Share
Data Patterns (India) Limited	Dividend - Rs 7.90 Per Share
Dhunseri Tea & Industries Limited	Dividend - Re 1 Per Share
Dhunseri Ventures Limited	Dividend - Rs 5 Per Share
Endurance Technologies Limited	Dividend - Rs 10 Per Share
Galaxy Surfactants Limited	Dividend - Rs 4 Per Share
Gateway Distriparks Limited	Interim Dividend - Rs 1.25 Per Share
LT Foods Limited	Interim Dividend - Re 1 Per Share
Marico Limited	Dividend - Rs 7 Per Share
Munjal Showa Limited	Dividend - Rs 4.50 Per Share
Narayana Hrudayalaya Ltd.	Dividend - Rs 4.50 Per Share
Premier Energies Limited	Interim Dividend - Re 0.25 Per Share
PTC India Limited	Dividend - Rs 6.70 Per Share
REC Limited	Interim Dividend - Rs 4.60 Per Share
Tamilnad Mercantile Bank Limited	Dividend - Rs 11 Per Share
Tasty Bite Eatables Limited	Dividend - Rs 2 Per Share
UFLEX Limited	Dividend - Rs 3 Per Share

(Source: NSE)

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