

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,094.64	78,883.34	78,895.10	78,497.34	78,639.03	+544.39	+0.70
NIFTY	24,383.60	24,572.70	24,774.30	24,515.15	24,774.30	+390.70	+1.60

INDICES START THE WEEK ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 544.39 points or 0.70% to settle at 78,639.03 and the Nifty was up by 390.70 points or 1.60% to settle at 24,774.30. The BSE Small Cap 250 was up by 1.32% and BSE 500 was up by 0.82%. On the sectoral front, IT, Realty, FMCG, Banks, Auto, Metal, Consumer Durables and Capital Goods were gaining indices. On the flip side, Oil & Gas and Healthcare were losing indices. Indigo, TCS, Infosys, Eternal and ITC were gainers on the Sensex; on the flip side, Sunpharma, Bharti Airtel, Maruti, Tata Steel and Mahindra & Mahindra were the top losers on the Sensex. On global front, Asian markets shut the day on a negative note and European indices are trading on a green note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
GRASIM	3,260.0	3,100.8	5.13
TCS	2,473.7	2,365.6	4.57
INDIGO	5,400.0	5,171.0	4.43
INFY	1,180.0	1,130.1	4.42
SHRIRAMFIN	1,090.2	1,046.7	4.16

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
APOLLOHOSP	8,820.0	8,957.0	-1.53
SUNPHARMA	1,963.5	1,990.5	-1.36
MARUTI	14,150	14,234	-0.59
ONGC	242.00	242.53	-0.22
TECHM	1,649.0	1,651.3	-0.14

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
BAJFINANCE	13758012	1,153.0	1,594.15
MARUTI	961183	14,150	1,356.68
ITC	45392755	287.00	1,311.99
HDFCBANK	14827841	753.00	1,116.48
ICICIBANK	7706747	1,460.0	1,114.30

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ITC	45392755	287.00	1,311.9
JIOFIN	36582683	263.00	957.15
TATASTEEL	27563681	191.00	524.78
ETERNAL	26906290	310.50	825.38
WIPRO	15840516	188.66	295.57



Indian equity indices extended their winning streak to a fourth consecutive session, driven by broad-based buying in IT, auto, and banking stocks. Markets made gap-up opening and maintained a positive momentum throughout the session, amid growing hopes of easing geopolitical tensions in West Asia after U.S. President Donald Trump stated that negotiations with Tehran are expected to resume. The Nifty witnessed a sharp spike in fag end of trade following introduction of CAS. Effective August 3, 2026, the SEBI introduced CAS for F&O-eligible stocks, with regular cash market trading in these stocks ending at 3:15 PM, followed by an auction to determine the closing price. Trading in non-F&O stocks continues until 3:30 PM, while the F&O trading session has been extended by 10 minutes, now concluding at 3:40 PM. The changes aim to improve price discovery, enhance market transparency, and reduce the scope for end-of-day price manipulation.

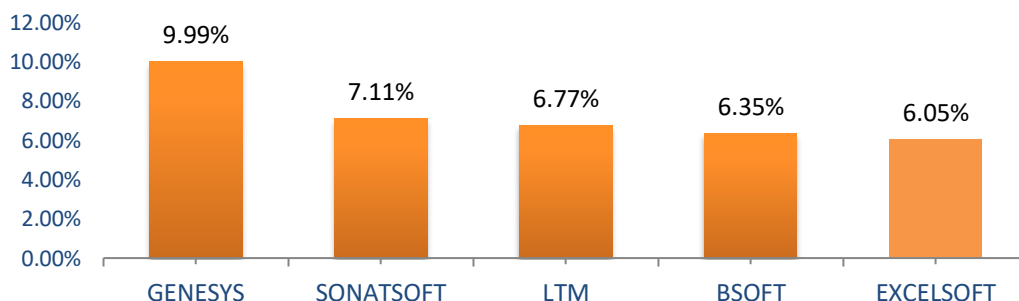
On the global front, European markets were trading mostly in green, as growing hopes for peace in the Middle East sent oil prices sharply lower, easing concerns over inflation and interest rates. Asian markets closed mostly in red as heavyweight semiconductor and artificial intelligence-related stocks came under selling pressure following Friday's record-breaking gains.

Source- AceEquity

NEWS BULLETIN

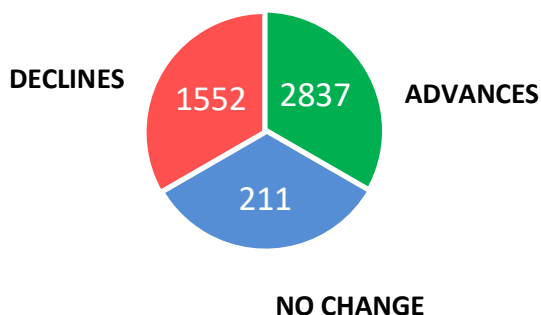
- **Escorts Kubota** has reported 72.34% fall in its net profit at Rs 387.34 crore for the quarter ended June 30, 2026 as compared to Rs 1,400.24 crore for the same quarter in the previous year. However, total income of the company has increased by 28.32% at Rs 3,386.34 crore for Q1FY27 as compared to Rs 2,638.96 crore for the corresponding quarter previous year.
- **NCC** has received three orders aggregating to Rs 1052.71 crore (excl. GST), during the month of July 2026. Of these orders received, Rs 590.38 crore pertains to the buildings division and Rs 462.33 crore pertains to the water division of the company.
- **Coal India** has reported rise of 8.4% in coal production to 50.4 million tonnes (MT) (Provisional) during July 2026 as compared to 46.4 MT (Provisional) in July 2025.

MARKET DRIVING SECTOR : IT

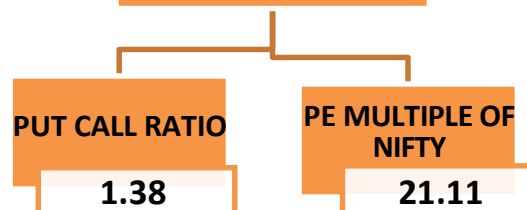


S&P BSE: IT
CLOSING: 30,249.21
CHANGE: + 746.92
CHANGE: + 2.53%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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