

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	83,432.89	83,398.08	83,516.82	83,262.23	83,442.50	+09.61	+0.01
NIFTY	25,461.00	25,450.45	25,489.80	25,407.25	25,461.30	+00.30	+0.00

## CHOPPY SESSION END ON A FLAT NOTE

The 30-share BSE Sensex was up by 9.60 points or 0.01% to settle at 83,442.50 and the Nifty was up by 0.30 points or 0.00% to settle at 25,461.30. The BSE Mid-Cap was down by 0.15% and BSE Small Cap was down by 0.33%. On the sectoral front, FMCG, Realty and Oil & Gas were gaining indices; on the flip side, Healthcare, Capital Goods, Auto, Consumer Durables, IT, Bank and Metal were losing indices. Hindustan Unilever, Kotak Bank, Trent, Reliance and ITC were the top gainers on the Sensex; on the flip side, BEL, Tech Mahindra, Ultratech Cement, Maruti and Eternal were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a positive note.

### Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
HINDUNILVR	2,408.70	2,339.30	2.97
TATACONSUM	1,106.00	1,089.70	1.50
NESTLEIND	2,420.40	2,392.80	1.15
EICHERMOT	5,688.00	5,629.00	1.05
JIOFIN	328.30	324.95	1.03

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BEL	417.00	427.55	-2.47
TECHM	1,622.40	1,655.20	-1.98
ONGC	241.40	245.24	-1.57
ULTRACEMCO	12,356.00	12,506.00	-1.20
MARUTI	12,507.00	12,646.00	-1.10

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	56,74,713	1,985.50	1,128.90
RELIANCE	72,51,074	1,540.50	1,115.98
BEL	2,22,21,724	417.00	930.71
BHARTIARTL	41,65,432	2,029.50	843.05
TRENT	14,45,372	5,497.00	792.41

### Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	2,54,46,186	259.20	656.38
BEL	2,22,21,724	417.00	930.71
TATASTEEL	1,74,69,909	162.52	283.82
JIOFIN	1,31,72,854	328.30	431.69
NTPC	94,54,556	338.15	318.76



Indian equity benchmarks ended flat with positive bias on Monday, amid geopolitical tensions in the Middle East. After making a slightly negative start, indices hovered near the neutral lines throughout the session, amid US Treasury Secretary Scott Bessent's comments that tariffs will be enforced starting August 1 for countries that haven't finalised an agreement with the Trump administration. Some concerns also came as Economic think tank GTRI cautioned that allowing genetically modified (GM) farm products from the US under the proposed trade pact would have implications for India as it may affect the country's agri exports to regions like the European Union. Traders took note of report that the Confederation of Indian Industry (CII) President Rajiv Memani has said India needs an average nominal Gross Domestic Product (GDP) growth rate of 10% annually. Sentiments remained downbeat as Foreign Institutional Investors (FIIs) offloaded equities worth Rs 760.11 crore on Friday, according to exchange data.

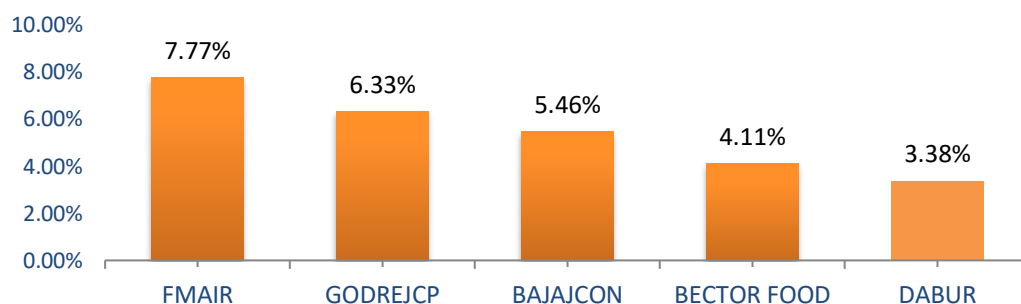
On Global front, European markets were trading mostly in green as relief at the extension of the tariff deadline to August 1. Asian markets ended mixed as Japan's leading index increased more than expected in May after falling in the previous three months.

Source: AceEquity

## NEWS BULLETIN

- **Jammu & Kashmir Bank's** total deposits stood at Rs 1,48,542.07 crore (provisional) as of June 30, 2025 (Q1FY26), posting a 12.05% rise in YoY terms as against Rs 1,32,573.13 crore as of June 30, 2024 and on QoQ basis, term deposits stood at Rs 1,48,569.46 crore as of March 31, 2025.
- **United Drilling Tools** has secured an order worth Rs 17.64 crore from Oil India, one of India's most respected PSUs in the oil and gas sector. The order is for supply of Line Casing Pipe and Crossover Pipe and is to be executed within 5 months.
- **ACME Solar Holdings** has placed an order of more than 3.1 GWh of Battery Energy Storage System (BESS) from leading global energy system suppliers including Zhejiang Narada and Trina Energy, renowned for their high efficiency and scalable storage solutions.

## MARKET DRIVING SECTOR : FMCG



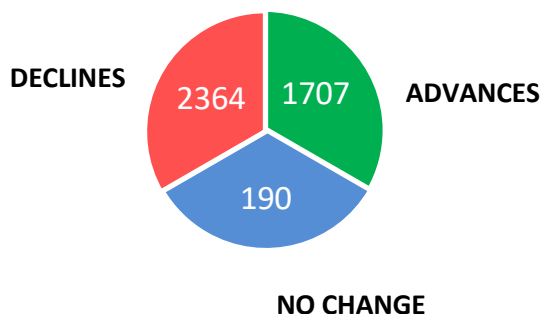
**S&P BSE: FMCG**

**CLOSING: 20,477.54**

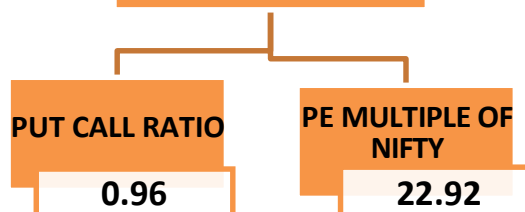
**CHANGE: + 301.71**

**CHANGE: + 1.50%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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