

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	83,712.51	83,625.89	83,781.36	83,382.28	83,536.08	-176.43	-0.21
NIFTY	25,522.50	25,514.60	25,548.70	25,424.35	25,476.10	-46.40	-0.18

BOURSES CLOSED marginally LOWER

The 30-share BSE Sensex was down by 176.43 points or 0.21% to settle at 83,536.08 and the Nifty was down by 46.40 points or 0.18% to settle at 25,476.10. The BSE Mid-Cap was down by 0.05% and BSE Small Cap was up by 0.45%. On the sectoral front, Consumer Durables, FMCG and Auto were gaining indices; on the flip side, Oil & Gas, Realty, Capital Goods, IT, Bank, Healthcare and Metal were losing indices. Bajaj Finance, Hindustan Unilever, Ultratech Cement, Mahindra & Mahindra and Powergrid were the top gainers on the Sensex; on the flip side, HCL Tech, Tata Steel, Tech Mahindra, Reliance and BEL 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
SHRIRAMFIN	680.70	668.95	1.76
BAJFINANCE	941.00	927.65	1.44
COALINDIA	387.85	382.85	1.31
HINDUNILVR	2,421.30	2,392.70	1.20
ULTRACEMCO	12,550.00	12,445.00	0.84

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HCLTECH	1,673.00	1,708.10	-2.05
HINDALCO	673.05	685.60	-1.83
TATASTEEL	159.20	161.97	-1.71
APOLLOHOSP	7,450.50	7,565.00	-1.51
TECHM	1,612.30	1,635.40	-1.41

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	69,30,714	2,008.50	1,391.06
RELIANCE	88,70,660	1,520.50	1,359.84
ICICIBANK	88,27,347	1,430.80	1,264.00
AXISBANK	86,74,795	1,165.00	1,011.46
JIOFIN	2,45,22,736	329.80	814.38

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	2,98,39,077	159.20	474.89
JIOFIN	2,45,22,736	329.80	814.38
ETERNAL	1,84,77,582	264.00	488.01
BEL	1,49,56,297	418.50	627.28
WIPRO	1,15,64,433	267.30	309.05



Indian equity benchmarks closed marginally lower on Wednesday, ahead of weekly F&O expiry. After making a negative start, indices hovered around the neutral lines for most of the session, as sentiments remained subdued after U.S. President Donald Trump offered no exceptions to his August 1 tariff start date and announced a 50 percent tariff on copper imports, expanding trade measures already in place for steel and aluminum. In final hour of trade, markets drifted into the red and ended with modest losses. Traders took note of an Australian official's statement that India is in talks with Australia to source rare earth minerals. The development assumes significance in the wake of rare earth magnet shortage caused by Chinese export restrictions. Traders overlooked Economic think tank Global Trade Research Initiative's (GTRI) statement that India could be among the countries expected to finalise a trade deal with the US soon.

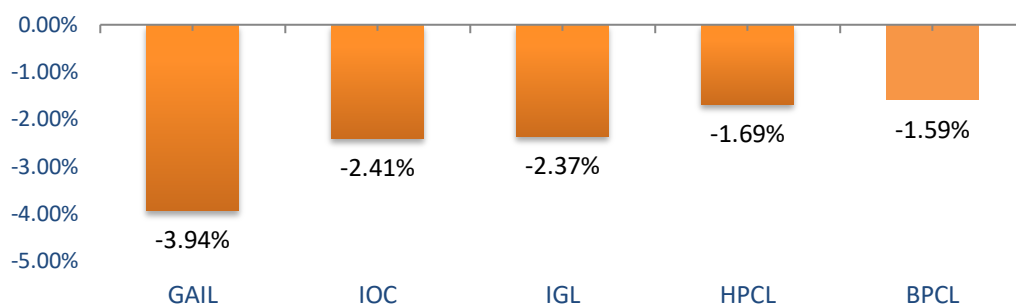
On Global front, European markets were trading in green as traders waited for an update on the US-EU trade deal. Asian markets ended mostly in green after US President Donald Trump expanded his trade war with steep new tariffs targeting copper, semiconductors and pharmaceuticals.

Source: AceEquity

NEWS BULLETIN

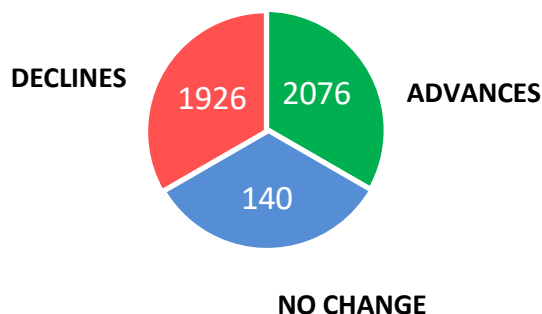
- **Synergy Green Industries** has secured a development order for 3.3 MW turbine parts from Adani New Industries' wind energy division -- Adani Wind. The development phase is expected to be completed in Q3 of FY 2026, with serial production scheduled in Q4 of FY 2026.
- **Signatureglobal (India)** has reported a 15 per cent decline in sales bookings to Rs 2,640 crore in the first quarter of this fiscal (Q1FY26) as it sold less homes. Its sales bookings or pre-sales stood at Rs 3,120 crore in the year-ago period.
- **Seamec** has secured a contract from M/s Oil and Natural Gas Corporation for repair/ replacement of spider deck members of platform NLM9 in Western Offshore. The total contract value will be Rs 39.20 crore.

MARKET DRIVING SECTOR : OIL & GAS

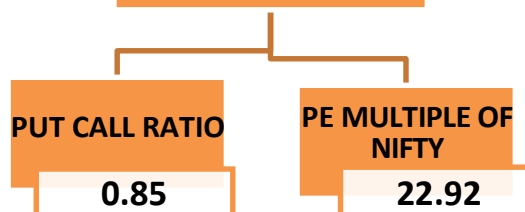


S&P BSE: OIL & GAS
CLOSING: 28,149.59
CHANGE: - 403.48
CHANGE: - 1.41%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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