

10th July 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	83,536.08	83,536.08	83,536.08	83,536.08	83,190.28	-345.80	-0.41
NIFTY	25,476.10	25,511.65	25,524.05	25,340.45	25,355.25	-120.85	-0.47

INDICES CAUTIOUS AMID NEW TARIFFS THREAT

The 30-share BSE Sensex was down by 345.80 points or 0.41% to settle at 83,190.28 and the Nifty was down by 120.85 points or 0.47% to settle at 25,355.25. The BSE Mid-Cap was down by 0.28% and BSE Small Cap was up by 0.12%. On the sectoral front, Oil & Gas, Realty and Metal were gaining indices; on the flip side, IT, Consumer Durables, Auto, FMCG, Capital Goods, Bank and Healthcare were losing indices. Maruti, Tata Steel, Bajaj Finance, Bajaj Finserv and Trent were the top gainers on the Sensex; on the flip side, Bharti Airtel, Asian Paint, Infosys, BEL and Tech Mahindra 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
INDUSINDBK	853.90	840.75	1.56
MARUTI	12,644.00	12,470.00	1.40
TATASTEEL	160.63	159.00	1.03
BAJFINANCE	946.85	940.60	0.66
JIOFIN	331.85	329.85	0.61

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BHARTIARTL	1,964.00	2,019.70	-2.76
ASIANPAINT	2,447.50	2,498.90	-2.06
HDFCLIFE	770.15	786.30	-2.05
APOLLOHOSP	7,353.00	7,469.00	-1.55
SHRIRAMFIN	671.75	681.05	-1.37

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	85,15,155	2,002.80	1,710.30
RELIANCE	1,00,47,129	1,515.20	1,523.35
KOTAKBANK	57,21,813	2,216.90	1,263.91
BHARTIARTL	56,95,845	1,964.00	1,128.49
ICICIBANK	77,95,964	1,424.00	1,112.07

Most Active (by volume)

Name	Qty	Pr.	Value CR
BEL	1,79,14,452	413.35	742.59
TATASTEEL	1,75,66,887	160.63	281.83
ETERNAL	1,71,36,740	262.35	452.94
JIOFIN	1,39,73,005	331.85	463.72
SBIN	1,21,78,137	807.55	987.07



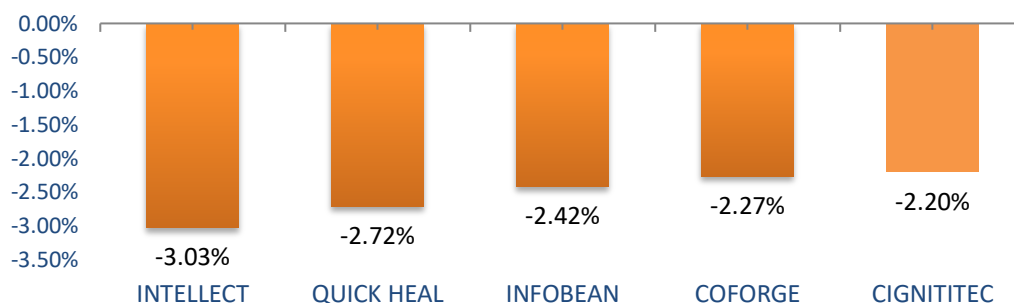
Indian equity benchmarks closed lower on Thursday, weighed down by selling pressure in IT and TECK stocks. Traders remained cautious due to ongoing trade negotiations between the US and India, as well as the commencement of the Q1 FY26 earnings season. After making a slightly positive start, soon indices turned downward and stayed lower throughout the day, as traders were cautious with a private report stating that US President Donald Trump's threat to impose new tariffs on India over its participation in the BRICS forum puts New Delhi. Traders paid nod head towards Commerce and Industry Minister Piyush Goyal's statement that free trade agreements (FTAs) with developed markets such as Australia, UAE and UK will provide greater market access for the domestic agri sector. Traders took note of report that Prime Minister Narendra Modi held talks with Namibian President Netumbo Nandi-Ndaitwah focused on imparting a new momentum to the bilateral ties. Traders overlooked Secretary of Ministry of Ports, Shipping and Waterways, Government of India T.K. Ramachandran's statement that India has become the fourth-largest economy, having surpassed \$4 trillion and is witnessing a rapid surge in foreign investments.

On Global front, European markets were trading in green as optimism prevailed about a potential trade deal between the U.S. and the European Union.
Source: AceEquity

NEWS BULLETIN

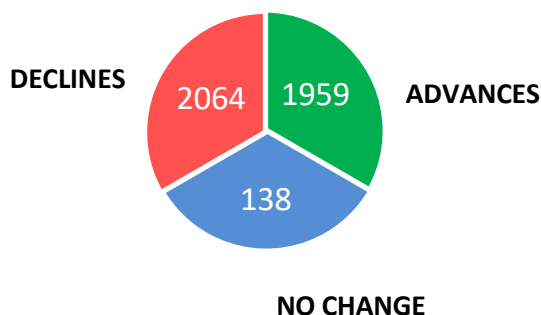
- **Desco Infratech** has received orders totalling around Rs 2.06 crore (inclusive of GST) from Torrent Gas Chennai and HCG (KCE) for DPNG Work for high-rise buildings at Chennai and domestic, industrial and commercial customer including service line MDPE laying/installation of PNG connections in high rise buildings at Hisar, Haryana.
- **Union Bank of India's** total business stood at Rs 22,14,480 crore (provisional) as of June 30, 2025 (Q1FY26), posting an 5.01% rise in YoY terms as against Rs 21,08,762 crore as of June 30, 2024 and on QoQ basis, total business stood at Rs 22,55,141 crore as of March 31, 2025.
- **Orient Technologies** has secured a purchase order from Protean eGov Technologies for AWS infrastructure procurement, setup, and support.

MARKET DRIVING SECTOR : IT

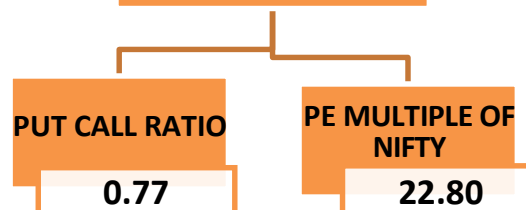


S&P BSE: IT
CLOSING: 37,649.24
CHANGE: - 271.04
CHANGE: - 0.71%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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