

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,500.47	82,537.87	82,537.87	82,010.38	82,253.46	-247.01	-0.30
NIFTY	25,149.85	25,149.50	25,151.10	25,001.95	25,082.30	-67.55	-0.27

INDICES START THE WEEK WITH NEGATIVE BIAS

The 30-share BSE Sensex was down by 247.01 points or 0.30% to settle at 82,253.46 and the Nifty was down by 67.55 points or 0.27% to settle at 25,082.30. The BSE Mid-Cap was up by 0.67% and BSE Small Cap was up by 0.57%. On the sectoral front, Realty, Oil & Gas, Consumer Durables, Healthcare, Bank, Auto, FMCG and Metal were gaining indices; on the flip side, IT and Capital Goods were losing indices. Eternal, Titan, Sunpharma, ITC and Mahindra & Mahindra were the top gainers on the Sensex; on the flip side, Asian Paint, Tech Mahindra, Bajaj Finance, Infosys and HCL Tech 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 negative note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ETERNAL	271.00	263.35	2.90
TITAN	3,402.00	3,361.60	1.20
HDFCLIFE	767.00	759.00	1.05
ONGC	244.15	241.76	0.99
GRASIM	2,789.00	2,762.00	0.98

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
JIOFIN	319.30	325.80	-2.00
TECHM	1,575.00	1,602.50	-1.72
WIPRO	254.25	258.30	-1.57
INFY	1,570.50	1,594.90	-1.53
HCLTECH	1,613.50	1,638.30	-1.51

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
RELIANCE	1,03,11,846	1,486.40	1,534.14
INFY	91,73,426	1,570.50	1,439.66
ETERNAL	5,01,84,664	271.00	1,360.10
HDFCBANK	65,44,425	1,982.90	1,295.00
TCS	39,24,009	3,227.50	1,265.38

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	5,01,84,664	271.00	1,360.1
JIOFIN	1,79,80,889	319.30	578.01
BEL	1,78,44,425	407.50	727.05
TATASTEEL	1,51,52,964	160.25	242.78
NTPC	1,15,16,965	341.50	394.53



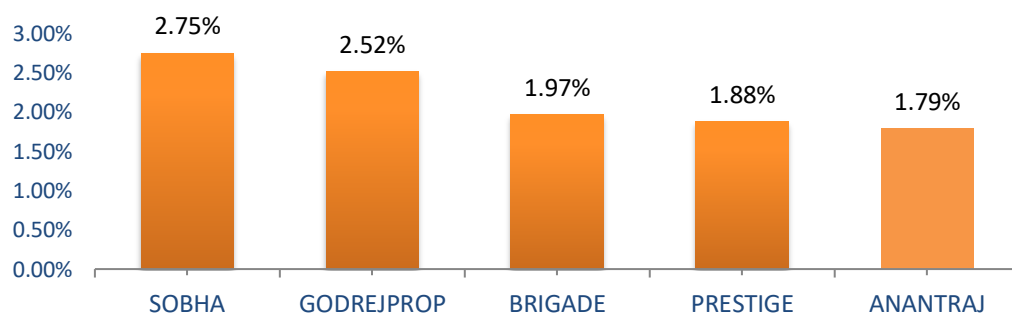
Indian equity benchmarks ended lower on Monday weighed down by broad-based selling in IT and TECK sectors, as well as persistent foreign fund outflows. According to exchange data, Foreign Institutional Investors (FIIs) offloaded equities worth Rs 5,104.22 crore on Friday. After making a cautious start, soon indices slipped into negative territory and remained under pressure throughout the session, amid lingering uncertainty over U.S. President Donald Trump's tariffs and India-U.S. bilateral trade deal. Traders were concerted as the RBI said that India's forex reserves dropped by \$3.04 billion to \$699.73 billion in the week ended July 4, 2025. Some concern also came as the government data showed that net direct tax collection fell 1.34 per cent to about Rs 5.63 lakh crore till July 10 of the current financial year, mainly on account on higher refunds. Traders remained cautious after inflation based on WPI in India dropped to (-) 0.13% in the month of June, from 0.39% in May 2025, marking the first negative reading since the beginning of the year.

On Global front, European markets were trading mostly in red after U.S. President Donald Trump threatened to impose a 30 percent tariff on European Union goods, raising concerns over a prolonged and deeper economic slowdown. Asian markets ended mostly in green as China's exports growth exceeded expectations and imports rebounded in June. Source: AceEquity

NEWS BULLETIN

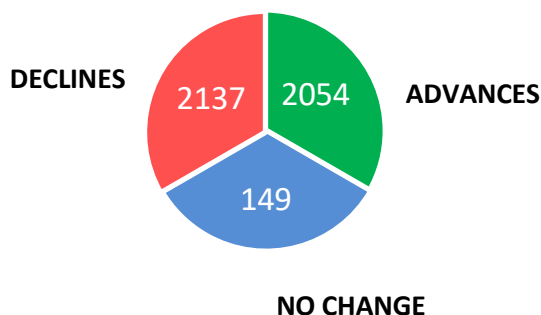
- **Shakti Pumps (India)** has invested Rs 12 crore in its wholly owned subsidiary namely Shakti Energy Solutions. In Shakti Energy Solutions, the company is establishing a greenfield high efficiency solar DCR cell and solar PV modules manufacturing plant, with a production capacity of 2.20 GW, in Pithampur, Madhya Pradesh.
- **NLC India** is planning to invest Rs 1.25 lakh crore by 2030 to expand its capacity from the existing 6.7 gigawatt to 20 gigawatt.
- **Sprayking** has received significant order for 60 MT of Brass Rods. The order is valued at around Rs 2 million. This substantial order highlights the company's commitment to delivering high-quality brass rods to meet the growing demands of various industries.

MARKET DRIVING SECTOR : REALTY

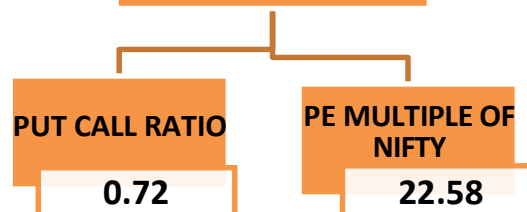


S&P BSE: REALTY
CLOSING: 7,585.51
CHANGE: + 103.41
CHANGE: + 1.38%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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