

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,570.91	82,534.66	82,784.75	82,342.94	82,634.48	+63.57	+0.08
NIFTY	25,195.80	25,196.60	25,255.30	25,121.05	25,212.05	+16.25	+0.06

## INDICES CLOSED ON A FLAT NOTE

The 30-share BSE Sensex was up by 63.57 points or 0.08% to settle at 82,634.48 and the Nifty was up by 16.25 points or 0.06% to settle at 25,212.05. The BSE Mid-Cap was up by 0.10% and BSE Small Cap was up by 0.28%. On the sectoral front, IT, Auto, Realty, Oil & Gas, Consumer Durables, Bank and FMCG were gaining indices; on the flip side, Healthcare, Capital Goods, Metal were losing indices. Mahindra & Mahindra, Tech Mahindra, SBIN, Infosys and Adani Ports were the top gainers on the Sensex; on the flip side, Eternal, Sunpharma, Tata Steel, Tata Motors and Bajaj Finance were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a positive note.

### Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
M&M	3,203.00	3,128.60	2.38
WIPRO	263.00	257.40	2.18
TECHM	1,608.50	1,579.00	1.87
NESTLEIND	2,458.00	2,416.30	1.73
SBIN	830.50	816.45	1.72

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
SHRIRAMFIN	668.20	684.45	-2.37
ETERNAL	262.10	266.45	-1.63
SUNPHARMA	1,704.00	1,727.50	-1.36
CIPLA	1,470.70	1,490.90	-1.35
TATASTEEL	157.30	159.00	-1.07

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	89,97,306	1,996.00	1,804.44
RELIANCE	1,04,09,983	1,486.20	1,542.16
SBIN	1,64,58,920	830.50	1,362.62
INFY	62,23,491	1,609.00	996.99
M&M	28,92,812	3,203.00	912.44

### Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	1,78,28,906	262.10	468.61
SBIN	1,64,58,920	830.50	1,362.6
TATASTEEL	1,45,91,157	157.30	229.78
JIOFIN	1,41,51,922	319.20	452.90
WIPRO	1,21,79,338	263.00	318.17



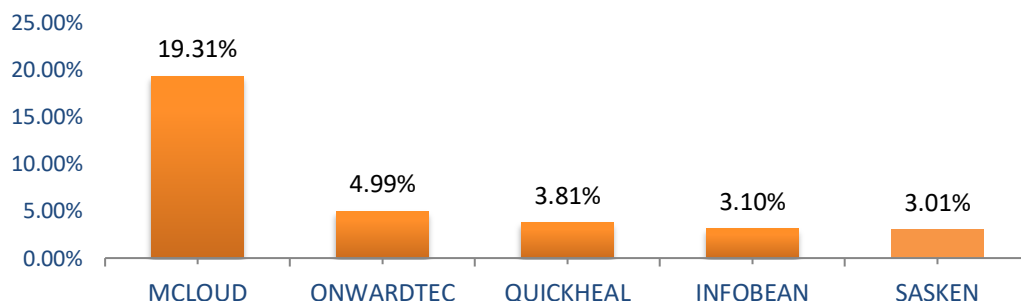
Indian equity benchmarks recouped early losses and ended flat with positive bias on Wednesday amid mixed global cues. After making a cautious start, markets remained below neutral lines in first half of the trading session following disappointing corporate earnings and uncertainty over US trade policy. In afternoon session, indices wiped out their losses and entered into green terrain led by gains in IT stocks. But markets failed to hold gains and ended near neutral lines amid concerns over potential India-US trade deal. Some support came as Economic Advisory Council to the Prime Minister (EAC-PM) Chairman S Mahendra Dev indicated that Indian economy is expected to grow at 6.5 per cent in the current financial year, despite geo-political tensions and trade policy uncertainties. Traders took encouragement as rating agency Crisil's latest research report stated that the consumer price index (CPI)-based inflation is expected to average 4% this financial year, as compared to 4.6% last fiscal. It noted that food inflation is expected to be softer given the forecasts of above-normal monsoon by the IMD.

On Global front, European markets are trading mostly higher with caution due to lingering tariff worries and disappointing earnings updates from the likes of ASML Holding NV and Renault SA.  
Source: AceEquity

## NEWS BULLETIN

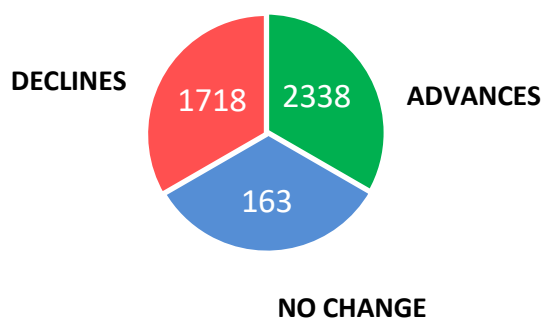
- **ITC Hotels** has reported 47.33% rise in its net profit at Rs 149.73 crore for the quarter ended June 30, 2025 as compared to Rs 101.63 crore for the same quarter in the previous year. Total income of the company increased by 19.84% at Rs 782.52 crore for Q1FY26 as compared to Rs 652.97 crore for the corresponding quarter previous year.
- **Just Dial** has reported 13.05% rise in its net profit at Rs 159.65 crore for the quarter ended June 30, 2025 as compared to Rs 141.22 crore for the same quarter in the previous year.
- **Hathway Cable & Datacom** has reported 33.52% rise in its net profit at Rs 21.43 crore for the quarter ended June 30, 2025 as compared to Rs 16.05 crore for the same quarter in the previous year.

## MARKET DRIVING SECTOR : IT

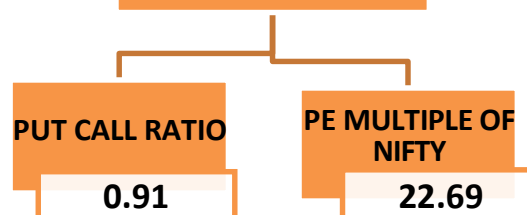


**S&P BSE: IT**  
**CLOSING: 37,081.11**  
**CHANGE: + 242.13**  
**CHANGE: + 0.66%**

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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