

17th July 2025

| Index | Previous Close | Open | High | Low | Close | Change | Change% |
|--------|----------------|-----------|-----------|-----------|-----------|---------|---------|
| SENSEX | 82,634.48 | 82,753.53 | 82,757.09 | 82,219.27 | 82,259.24 | -375.24 | -0.45 |
| NIFTY | 25,212.05 | 25,230.75 | 25,238.35 | 25,101.00 | 25,111.45 | -100.60 | -0.40 |

INDICES REMAINED UNDER SELLING PRESSURE AMID WEEKLY F&O EXPIRY

The 30-share BSE Sensex was down by 375.24 points or 0.45% to settle at 82,259.24 and the Nifty was down by 100.60 points or 0.40% to settle at 25,111.45. The BSE Mid-Cap was up by 0.07% and BSE Small Cap was up by 0.30%. On the sectoral front, Auto, Realty, Healthcare, Capital Goods, Consumer Durables, and FMCG were gaining indices; on the flip side, IT, Oil & Gas, Bank, Metal were losing indices. Tata Steel, Trent, Titan, Tata Motors and Ultratech Cement were the top gainers on the Sensex; on the flip side, Tech Mahindra, Infosys, HCL Tech, Eternal and Larsen & Toubro 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 |
|------------|-------------|--------------|------|
| TATACONSUM | 1,103.20 | 1,081.50 | 2.01 |
| TATASTEEL | 159.97 | 157.33 | 1.68 |
| HINDALCO | 672.00 | 666.75 | 0.79 |
| M&M | 3,216.00 | 3,196.50 | 0.61 |
| TRENT | 5,414.00 | 5,382.00 | 0.59 |

Top Losers

| Name | Closing Pr. | Previous Pr. | %Ch |
|------------|-------------|--------------|-------|
| TECHM | 1,564.20 | 1,607.90 | -2.72 |
| INDUSINDBK | 863.00 | 879.75 | -1.90 |
| INFY | 1,581.00 | 1,607.90 | -1.67 |
| WIPRO | 258.75 | 262.80 | -1.54 |
| SBILIFE | 1,802.40 | 1,829.10 | -1.46 |

MARKET STATS (NSE)

Most Active (by value)

| Name | Qty | Pr. | Value CR |
|------------|-------------|----------|----------|
| HDFCBANK | 1,12,64,579 | 1,986.00 | 2,243.74 |
| SBIN | 2,30,73,718 | 828.75 | 1,925.32 |
| ICICIBANK | 1,29,27,394 | 1,418.40 | 1,831.36 |
| RELIANCE | 1,18,54,613 | 1,478.70 | 1,754.21 |
| BHARTIARTL | 62,56,455 | 1,929.30 | 1,210.02 |

Most Active (by volume)

| Name | Qty | Pr. | Value CR |
|-----------|-------------|----------|----------|
| SBIN | 2,30,73,718 | 828.75 | 1,925.3 |
| TATASTEEL | 2,17,33,241 | 159.97 | 345.67 |
| ETERNAL | 1,75,44,857 | 259.75 | 456.80 |
| ICICIBANK | 1,29,27,394 | 1,418.40 | 1,831.3 |
| JIOFIN | 1,20,37,735 | 319.00 | 384.21 |



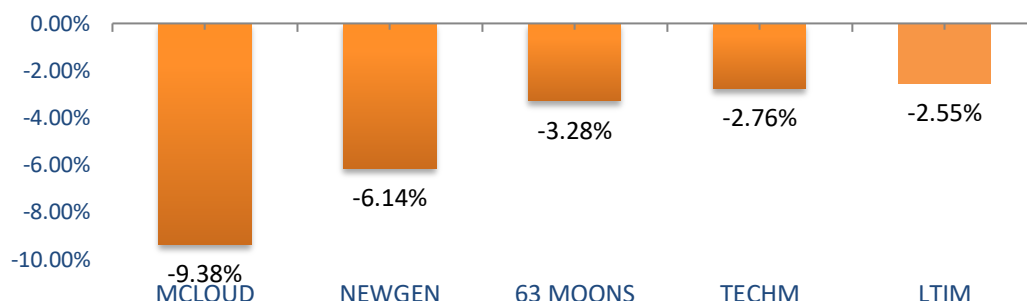
Domestic markets magnified their losses in last leg of trade and concluded the Thursday's trading session near day's low levels amid U.S. tariff-related uncertainty. After making slightly positive start, soon indices entered into red territory as investors preferred to play safe. Besides, traders kept their close watch towards Q1 earnings. Further, markets remained under selling pressure till end of the session amid weekly F&O expiry. Traders overlooked Reserve Bank of India's (RBI) latest report stating that outward foreign direct investment (OFDI) by domestic firms has seen a jump of 73.77% to \$5,030.48 million in June 2025 as against \$2,894.90 million in June 2024. In May 2025, it stood at \$2,702.92 million. US President Donald Trump said that America has another trade deal coming up, possibly with India. Trump's comments come at a time when India's commerce officials are in Washington DC for another round of trade deal talks.

On Global front, European markets were trading higher despite Euro area inflation rose slightly to the European Central Bank's 2 percent target in June, as initially estimated. Annual inflation moved up to 2.0 percent in June from 1.9 percent in May. Asian equity markets ended mostly in green after U.S. President Donald Trump denied plans to fire Federal Reserve Chairman Jerome Powell.
Source: AceEquity

NEWS BULLETIN

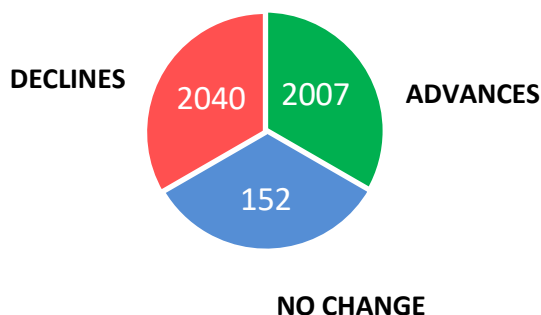
- **Polycab India** has reported 46.47% jump in its net profit at Rs 567.83 crore for the quarter ended June 30, 2025 as compared to Rs 387.67 crore for the same quarter in the previous year. Total income of the company increased by 24.15% at Rs 5786.86 crore for Q1FY26 as compared to Rs 4661.20 crore for the corresponding quarter previous year.
- **South Indian Bank** has reported 9.46% rise in its net profit at Rs 321.95 crore for the first quarter ended June 30, 2025 as compared to Rs 294.13 crore for the same quarter in the previous year.
- **Angel One** has reported 54.96% fall in its net profit at Rs 133.91 crore for the quarter ended June 30, 2025 as compared to Rs 297.33 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : IT

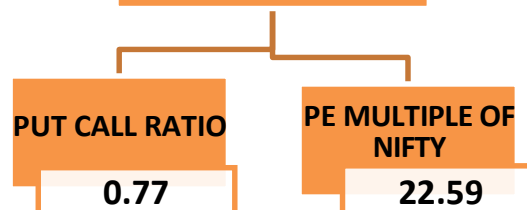


S&P BSE: IT
CLOSING: 36,589.04
CHANGE: - 492.07
CHANGE: - 1.33%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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