

21th July 2025

| Index | Previous Close | Open | High | Low | Close | Change | Change% |
|--------|----------------|-----------|-----------|-----------|-----------|---------|---------|
| SENSEX | 81,757.73 | 81,918.53 | 82,274.03 | 81,518.66 | 82,200.34 | +442.63 | +0.54 |
| NIFTY | 24,968.40 | 24,999.00 | 25,111.40 | 24,882.30 | 25,090.70 | +122.30 | +0.49 |

STRONG Q1 EARNINGS FROM HEAVYWEIGHTS

The 30-share BSE Sensex was up by 442.63 points or 0.54% to settle at 82,200.34 and the Nifty was up by 122.30 points or 0.49% to settle at 25,090.70. The BSE Mid-Cap was up by 0.55% and BSE Small Cap was down by 0.01%. On the sectoral front, Capital Goods, Auto, Realty, Bank, Metal and Consumer Durables were gaining indices; on the flip side, Healthcare, IT, FMCG and Oil & Gas were losing indices. Eternal, ICICI Bank, HDFC Bank, Mahindra & Mahindra and BEL were the top gainers on the Sensex; on the flip side, Reliance, HCL Tech, TCS, Hindustan Unilever and ITC 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 | 276.50 | 257.20 | 7.50 |
| ICICIBANK | 1,464.50 | 1,425.80 | 2.71 |
| HDFCBANK | 2,001.50 | 1,957.40 | 2.25 |
| M&M | 3,246.30 | 3,192.40 | 1.69 |
| HDFCLIFE | 751.90 | 739.50 | 1.68 |

Top Losers

| Name | Closing Pr. | Previous Pr. | %Ch |
|------------|-------------|--------------|-------|
| RELIANCE | 1,428.20 | 1,476.00 | -3.24 |
| WIPRO | 260.90 | 266.95 | -2.27 |
| INDUSINDBK | 851.00 | 870.05 | -2.19 |
| EICHERMOT | 5,561.50 | 5,627.50 | -1.17 |
| HCLTECH | 1,530.80 | 1,548.80 | -1.16 |

MARKET STATS (NSE)

Most Active (by value)

| Name | Qty | Pr. | Value CR |
|-----------|-------------|----------|----------|
| RELIANCE | 2,24,42,744 | 1,428.20 | 3,221.07 |
| HDFCBANK | 1,11,54,539 | 2,001.50 | 2,223.60 |
| ICICIBANK | 1,38,67,136 | 1,464.50 | 2,021.54 |
| ETERNAL | 6,75,08,530 | 276.50 | 1,813.35 |
| AXISBANK | 1,59,05,500 | 1,100.00 | 1,737.01 |

Most Active (by volume)

| Name | Qty | Pr. | Value CR |
|-----------|-------------|----------|----------|
| ETERNAL | 6,75,08,530 | 276.50 | 1,813.3 |
| TATASTEEL | 2,98,12,899 | 163.18 | 487.89 |
| RELIANCE | 2,24,42,744 | 1,428.20 | 3,221 |
| JIOFIN | 1,69,96,843 | 317.90 | 539.26 |
| AXISBANK | 1,59,05,500 | 1,100.00 | 1,737 |



Indian equity benchmarks ended near day's high points on Monday, supported by strong Q1 earnings from heavyweights like HDFC Bank and ICICI Bank. After making a cautious start, soon indices added some gains and remained higher throughout the day, as traders took support with exchange data showed foreign institutional investors (FIIs) purchased equities worth Rs 374.74 crore on a net basis on Friday. Some support also came as Union Commerce and Industry Minister Piyush Goyal said that India remains a key destination for overseas investments and is likely to attract \$100 billion in foreign direct investments (FDIs) from the four-nation European bloc European Free Trade Association (EFTA). Traders took note of report that Prime Minister Narendra Modi will be on two-day visit to the United Kingdom (UK) on July 23-24, which will focus on increasing bilateral trade, and the signing of the India-UK Free Trade Agreement (FTA) in London.

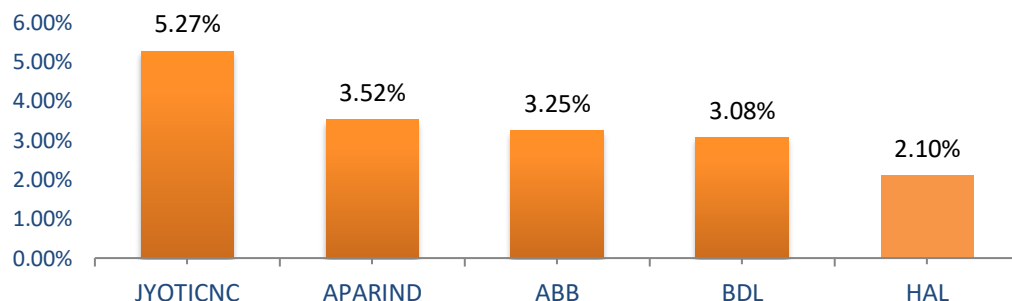
On Global front, European markets were trading in red as EU leaders prepare for a high-stakes showdown over U.S. tariff threats. Asian markets ended mostly in green despite trade tensions persisted, and Japan's ruling coalition lost control of the upper house in an election on Sunday.

Source: AceEquity

NEWS BULLETIN

- **UltraTech Cement** has reported 48.14% rise in its net profit at Rs 2231.79 crore for the quarter ended June 30, 2025 as compared to Rs 1506.54 crore for the same quarter in the previous year. The total income of the company increased by 7.18% at Rs 19789.64 crore for Q1FY26 as compared to Rs 18463.07 crore for the corresponding quarter previous year.
- **GPT Infraprojects** has received contract worth Rs 351 crore from Agra Gwalior Highway for construction of new major bridge including cable stayed bridge over chambal river at Agra-Gwalior Greenfield Highway Project.
- **Titagarh Rail Systems** has secured a letter of advance acceptance (LoA) worth Rs 312.69 crore from Ministry of Railways for manufacture and supply of 780 BVCM-C Wagons.

MARKET DRIVING SECTOR : CAPITAL GOODS



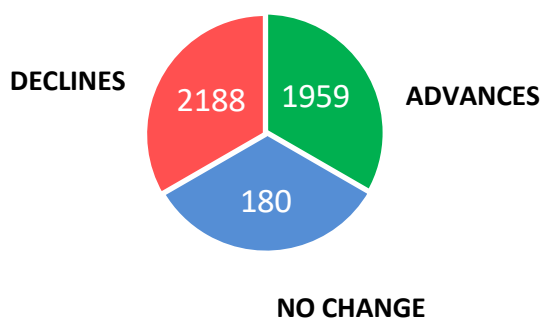
S&P BSE: CAPITAL GOODS

CLOSING: 71,135.53

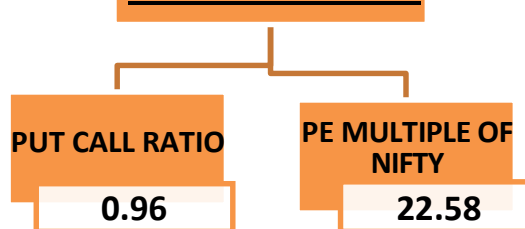
CHANGE: + 934.92

CHANGE: + 1.33%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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