

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,726.64	82,779.95	82,784.24	82,047.22	82,184.17	-542.47	-0.66
NIFTY	25,219.90	25,243.30	25,246.25	25,018.70	25,062.10	-157.80	-0.63

## INDICES CLOSED WITH SIGNIFICANT LOSS

The 30-share BSE Sensex was down by 542.47 points or 0.66% to settle at 82,184.17 and the Nifty was down by 157.80 points or 0.63% to settle at 25,062.10. The BSE Mid-Cap was down by 0.43% and BSE Small Cap was down by 0.50%. On the sectoral front, Auto were gaining index; on the flip side, IT, Healthcare, Consumer Durables, Bank, Realty, Metal, Capital Goods, FMCG and Oil & Gas were losing indices. Eternal, Tata Motors, Sunpharma, Tata Steel and Titan were the top gainers on the Sensex; on the flip side, Trent, Tech Mahindra, Reliance, HCL Tech and Bajaj Finserv 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
ETERNAL	312.45	302.05	3.44
DRREDDY	1,268.90	1,247.40	1.72
TATAMOTORS	701.30	690.10	1.62
TATACONSUM	1,073.00	1,062.60	0.98
CIPLA	1,486.30	1,473.50	0.87

### Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
NESTLEIND	2,316.00	2,452.50	-5.57
TRENT	5,148.00	5,359.00	-3.94
TECHM	1,496.20	1,546.60	-3.26
SHRIRAMFIN	633.30	654.05	-3.17
RELIANCE	1,402.80	1,424.60	-1.53

## MARKET STATS (NSE)

### Most Active (by value)

Name	Qty	Pr.	Value CR
ETERNAL	12,06,03,751	312.45	3,752.22
INFY	1,41,69,664	1,553.00	2,207.35
RELIANCE	1,47,40,507	1,402.80	2,074.08
HDFCBANK	95,53,588	2,011.70	1,928.98
AXISBANK	99,01,209	1,095.60	1,084.72

### Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	12,06,03,751	312.45	3,752.2
TATAMOTOR	1,51,97,664	701.30	1,067
RELIANCE	1,47,40,507	1,402.80	2,074
TATASTEEL	1,43,77,270	163.60	235.34
INFY	1,41,69,664	1,553.00	2,207.3



Indian equity benchmarks ended with significant losses on Thursday, with both the Nifty and Sensex closing over half a percent cut. Investors' sentiments remained subdued due to the weekly F&O expiry. Despite strong June quarter earnings from Infosys, markets failed to gain momentum. After making a slightly positive start, indices quickly turned negative and remained in the red throughout the session. Uncertainty surrounding the India-US trade deal and persistent foreign fund outflows further weighed on investors' sentiments. Traders were cautious as the Reserve Bank of India's latest monthly bulletin stated that net foreign direct investment (FDI) into India fell 98% year-on-year to \$35 million in May 2025 amid higher repatriation by overseas investors and a fall in gross inflows. Some cautiousness came as a paper by RBI staffers release indicated that a 10 per cent increase in global crude oil prices can raise the domestic headline inflation by 0.20 per cent.

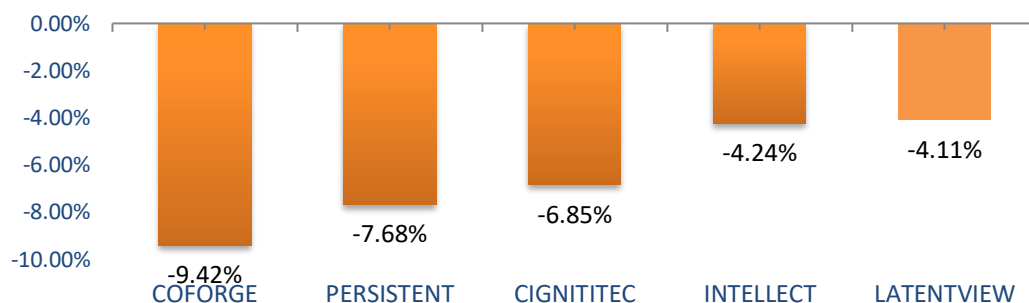
On Global front, European markets were trading in green, as investors digested a slew of earnings and awaited the European Central Bank's interest-rate decision later in the day. Asian markets ended mostly in green, after Japan's private sector logged a steady growth in July as stronger growth in the service sector was offset by a fall in manufacturing output.

Source: AceEquity

## NEWS BULLETIN

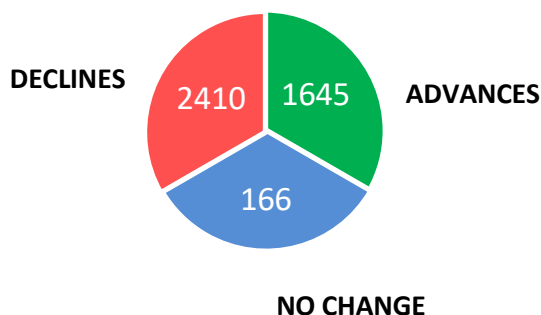
- **Force Motors** has reported 54.88% rise in its net profit at Rs 185.22 crore for the quarter ended June 30, 2025 as compared to Rs 119.59 crore for the same quarter in the previous year. The total income of the company increased by 22.24% at Rs 2,322.18 crore for Q1FY26 as compared to Rs 1,899.75 crore for the corresponding quarter previous year.
- **Nestle India** has reported 11.70% fall in its net profit at Rs 659.23 crore for the first quarter ended June 30, 2025 as compared to Rs 746.60 crore for the same quarter in the previous year.
- **Persistent Systems** has reported 50.84% jump in its net profit at Rs 373.99 crore for the quarter ended June 30, 2025 as compared to Rs 247.94 crore for the same quarter in the previous year.

## MARKET DRIVING SECTOR : IT

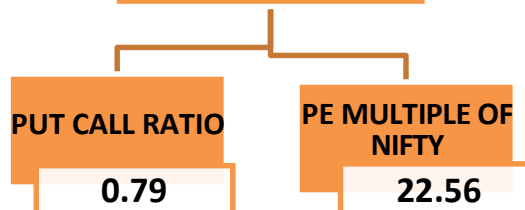


**S&P BSE: IT**  
**CLOSING: 35,688.95**  
**CHANGE: - 669.38**  
**CHANGE: - 1.84%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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