

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,710.25	80,694.98	80,834.43	80,448.82	80,543.99	-166.26	-0.21
NIFTY	24,649.55	24,641.35	24,671.40	24,539.20	24,574.20	-75.35	-0.31

RBI KEEPS POLICY RATE UNCHANGED

The 30-share BSE Sensex was down by 166.26 points or 0.21% to settle at 80,543.99 and the Nifty was down by 75.35 points or 0.31% to settle at 24,574.20. The BSE Mid-Cap was down by 1.00% and BSE Small Cap was down by 1.14%. On the sectoral front, Bank were gaining index; on the flip side, FMCG, Metal, Oil & Gas, IT, Consumer Durables, Healthcare, Realty and Auto were losing indices. Asian Paint, BEL, Trent, Adani Ports and SBIN were the top gainers on the Sensex; on the flip side, Sunpharma, 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 positive note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ASIANPAINT	2,484.10	2,436.80	1.94
HDFCLIFE	752.40	738.50	1.88
M&M	3,240.10	3,212.20	0.87
BEL	389.30	386.65	0.69
COALINDIA	376.50	379.50	0.67

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
WIPRO	239.75	245.91	-2.50
SUNPHARMA	1,593.50	1,632.10	-2.37
JIOFIN	326.00	332.85	-2.06
TECHM	1,455.00	1,485.40	-2.05
INDUSINDBK	803.00	819.15	-1.97

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
INFY	1,05,66,934	1,433.00	1,522.06
HDFCBANK	70,40,102	1,987.00	1,392.81
TRENT	24,86,662	5,335.00	1,338.52
ICICIBANK	78,05,252	1,443.50	1,129.04
BHARTIARTL	54,61,349	1,924.00	1,059.03

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	2,20,12,280	300.05	657.40
BEL	1,68,52,693	389.30	656.55
NTPC	1,38,72,826	332.55	463.17
TATASTEEL	1,34,38,851	158.70	213.11
POWERGRID	1,29,85,269	284.80	370.39



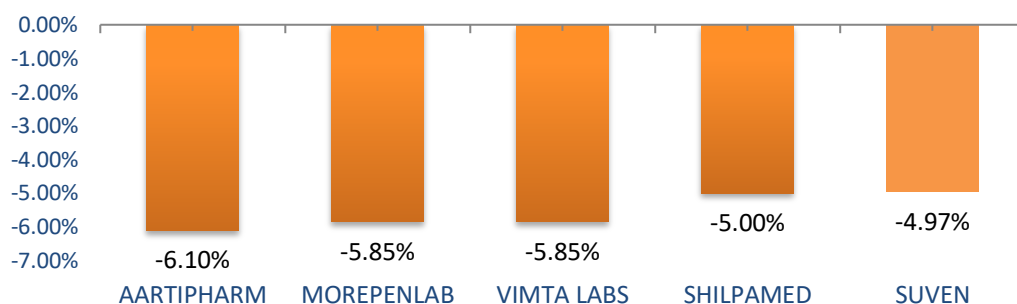
Indian equity benchmarks ended lower on Wednesday, as traders were cautious following the Reserve Bank of India's (RBI) Monetary Policy Committee (MPC) decision to keep the repo rate unchanged. After making a cautious start, soon markets traded in red and remained lower throughout the day, as sentiments remained subdued amid fresh tariff threats from US President Donald Trump. Traders were cautious after the RBI Governor Sanjay Malhotra-led MPC announced to keep the repo rates unchanged at 5.5 per cent. Real GDP projection was kept unchanged at 6.6 per cent For FY26. Traders took note of Business Expectations Survey of National Council of Applied Economic Research (NCAER) report showed that the Business Confidence Index (BCI) rose sharply to 149.4 in the April-June period from 139.3 in the last quarter of 2024-25.

On Global front, European markets were trading in green, despite weak factory orders data from Germany and fresh tariff threats from U.S. President Donald Trump on pharma and chips. Asian markets ended mixed after weakening US services data fueled uncertainty about the Federal Reserve's policy path.
Source: AceEquity

NEWS BULLETIN

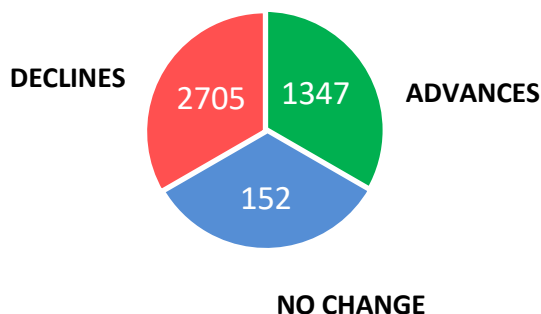
- **Bajaj Auto** has reported 5.41% jump in its net profit at Rs 2,095.98 crore for the quarter ended June 30, 2025 as compared to Rs 1,988.34 crore for the same quarter in the previous year. The total income of the company increased by 6.26% at Rs 13,015.21 crore for Q1FY26 as compared to Rs 12,248.96 crore for the corresponding quarter previous year.
- **Gujarat Fluorochemicals** has reported 66.67% jump in its net profit at Rs 185 crore for the quarter ended June 30, 2025 as compared to Rs 111 crore for the same quarter in the previous year.
- **NCC India** has reported 5.30% decline in its net profit at Rs 190.10 crore for the quarter ended June 30, 2025 as compared to Rs 200.74 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : HEALTHCARE

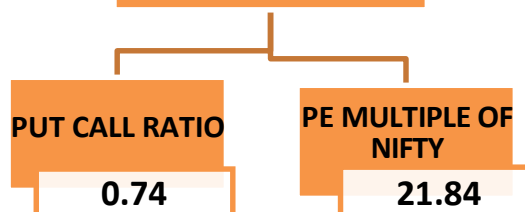


S&P BSE: HEALTHCARE
CLOSING: 43,412.36
CHANGE: - 761.99
CHANGE: - 1.72%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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