

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,543.99	80,262.98	80,737.55	79,811.29	80,623.26	+79.27	+0.10
NIFTY	24,574.20	24,464.20	24,634.20	24,344.15	24,596.15	+21.95	+0.09

INDICES RECOVERED FROM DAY'S LOW

The 30-share BSE Sensex was up by 79.27 points or 0.10% to settle at 80,623.26 and the Nifty was up by 21.95 points or 0.09% to settle at 24,596.15. The BSE Mid-Cap was up by 0.30% and BSE Small Cap was down by 0.18%. On the sectoral front, IT, Bank, Metal and Realty were gaining index; on the flip side, FMCG, Oil & Gas, Consumer Durables and Healthcare were losing indices. Tech Mahindra, HCL Tech, Eternal, Axis Bank and Maruti were the top gainers on the Sensex; on the flip side, Adani Ports, Trent, Tata Motors, Hindustan Unilever and NTPC 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
HEROMOTO	4,666.10	4,474.90	4.27
TECHM	1,488.10	1,459.00	1.99
JSWSTEEL	1,073.00	1,052.60	1.94
ETERNAL	303.20	298.85	1.46
WIPRO	242.80	239.96	1.18

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIENT	2,245.90	2,300.30	-2.36
ADANI PORTS	1,347.50	1,367.10	-1.43
GRASIM	2,741.90	2,765.80	-0.86
HINDUNILVR	2,516.00	2,535.60	-0.77
TRENT	5,316.00	5,356.50	-0.76

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
ETERNAL	39,15,48,871	303.20	11,475.1
KOTAKBANK	1,45,52,199	1,994.20	2,866.78
INFY	98,92,020	1,441.00	1,413.37
RELIANCE	99,76,705	1,391.00	1,378.30
HDFCBANK	65,40,593	1,998.00	1,299.02

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	39,15,48,871	303.20	11,475
TATASTEEL	2,31,59,540	159.83	365.74
JIOFIN	1,64,61,908	327.40	530.39
KOTAKBANK	1,45,52,199	1,994.20	2,866.7
TATAMOTOR	1,36,09,913	650.00	873.04



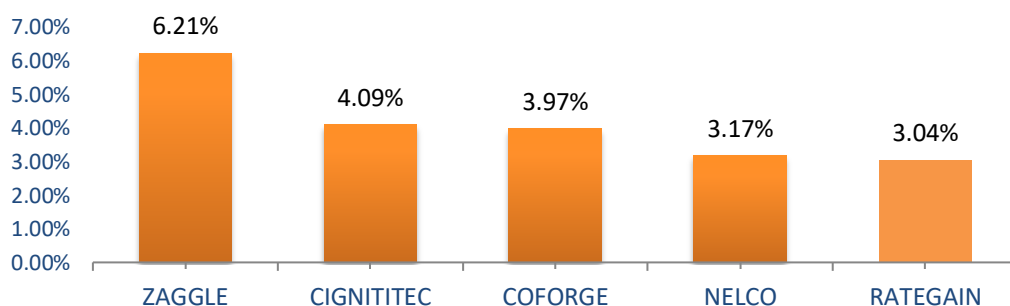
Indian equity benchmarks staged a strong recovery on Thursday, driven by value buying in IT and Pharma stocks. After making a cautious start, soon markets slipped into red as traders were cautious after US President Donald Trump slapped an additional 25 per cent duty -- doubling it to 50 per cent -- on Indian goods over New Delhi's continued imports of Russian oil. However, in last hour of trade, markets came off from day's low points and ended in positive territory. Traders took support of quarterly Services and Infrastructure Outlook Survey of Reserve Bank of India noting that services firms maintained their positive outlook on demand conditions in Q2:2025-26, though their level of optimism recorded some moderation vis-a-vis the previous quarter. Traders overlooked Federation of Indian Export Organisations (FIEO) DG Ajay Sahai's statement that the US' decision to impose an additional 25% tariff on Indian goods is extremely shocking and will impact 55% of India's exports to US.

On Global front, European markets were trading mostly in green, ahead of the Bank of England's interest-rate decision. Asian markets ended mostly in green amid hopes for Sino-U.S. trade deal and better-than-expected China's July exports data.
Source: AceEquity

NEWS BULLETIN

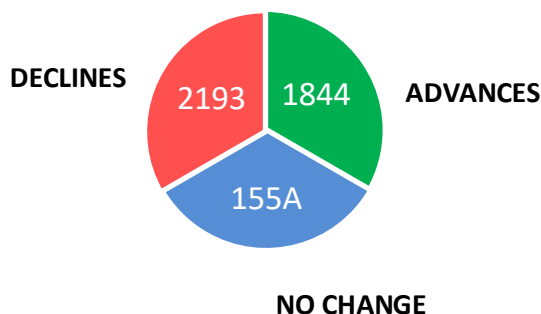
- **Caplin Point Laboratories** has reported 18.40% rise in its net profit at Rs 85.89 crore for the quarter ended June 30, 2025 as compared to Rs 72.54 crore for the same quarter in the previous year. The total income of the company increased by 3.60% at Rs 214.60 crore for Q1FY26 as compared to Rs 207.14 crore for the corresponding quarter previous year.
- **Knowledge Marine & Engineering Works** has received work order from Iwai for the design, construction and supply of 6 Nos. of Work Boats and 6 Nos. of Accommodation Boats. The contract shall be executed over a period 20 months and is valued at Rs 80.69 crore inclusive of GST.
- **Tasty Bite Eatables** has reported net profit at Rs 8.19 crore for the quarter ended June 30, 2025 as compared to a net loss of Rs 3.69 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : IT

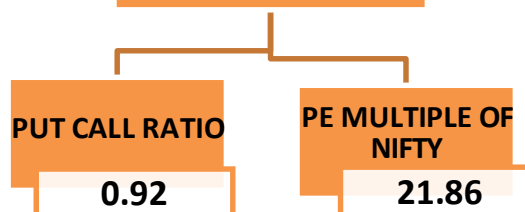


S&P BSE: IT
CLOSING: 34,153.57
CHANGE: + 246.84
CHANGE: + 0.73%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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