

18<sup>th</sup> AUG 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,597.66	81,315.79	81,765.77	81,202.42	81,273.75	+676.09	+0.84
NIFTY	24,631.30	24,938.20	25,022.00	24,852.85	24,876.95	+245.65	+1.00

## BOURSES START THE WEEK ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 676.09 points or 0.84% to settle at 81,273.75 and the Nifty was up by 245.65 points or 1.00% to settle at 24,876.95. The BSE Mid-Cap was up by 1.00% and BSE Small Cap was up by 1.39%. On the sectoral front, Auto, Metal, FMCG, Oil & Gas, Realty, Healthcare, Capital Goods, Consumer Durables, Bank and were gaining indices; on the flip side, IT losing index. Maruti, Bajaj Finance, Ultratech Cement, Bajaj Finserv and Mahindra & Mahindra were the top gainers on the Sensex; on the flip side, ITC, Larsen & Toubro, Eternal, Tech Mahindra and NTPC 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 negative note.

## Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
MARUTI	14,090.00	12,936.00	8.92
HEROMOTO	4,990.00	4,708.10	5.99
NESTLEIND	1,146.40	1,089.40	5.23
BAJFINANCE	905.05	861.45	5.06
BAJAJ-AUTO	8,592.00	8,213.50	4.61

## Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ITC	405.30	411.45	-1.49
ETERNAL	314.10	318.40	-1.35
TECHM	1,470.50	1,486.70	-1.09
LT	3,640.00	3,677.00	-1.01
NTPC	336.30	339.35	-0.90

## MARKET STATS (NSE)

## Most Active (by value)

Name	Qty	Pr.	Value CR
MARUTI	21,54,781	14,090.0	3,003.37
M&M	57,87,481	3,379.00	1,968.59
HDFCBANK	96,42,398	2,005.00	1,936.90
HEROMOTO	36,98,091	4,990.00	1,864.41
RELIANCE	1,17,85,109	1,382.90	1,631.29

## Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	6,10,22,494	157.97	960.68
ETERNAL	4,23,57,084	314.10	1,345.7
ITC	3,09,50,814	405.30	1,264.9
BAJFINANCE	1,62,77,779	905.05	1,478.3
TATAMOTOR	1,42,26,172	675.90	965.52



Indian equity benchmarks ended with significant gains on Monday, supported by gains in Auto, Consumer Durable and realty. Markets made a gap-up opening and remained higher till end of the day, as sentiments remained upbeat with S&P Global Ratings upgraded India's sovereign ratings and Prime Minister Narendra Modi promised next generational GST reforms by Diwali, which will bring down the tax burden on consumers as well as MSMEs. Some support also came as the commerce ministry data showed that the India's goods exports to the US grown 19.94% to \$8.01 billion in the month of July. Traders took support with commerce ministry in its latest data has showing that India's merchandise exports rebounded by 7.29 per cent to \$37.24 billion in July 2025 as compared to \$34.71 billion in July 2024. Some support also came as RBI's data showed that India's forex reserves surged by \$4.74 billion to \$693.62 billion for the week ended August 8, 2025.

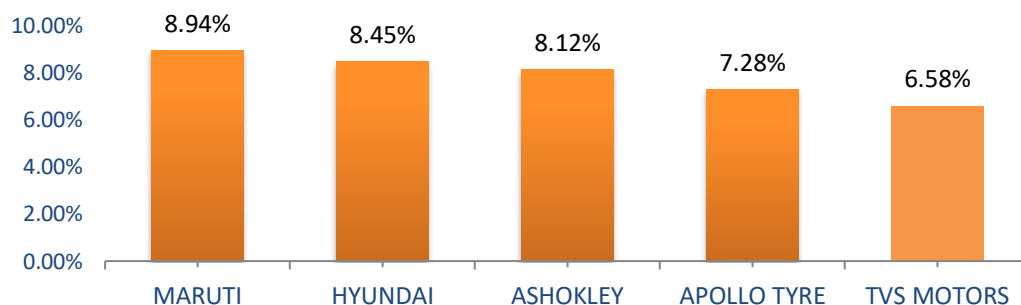
On Global front, European markets were trading mostly in red, after the Trump-Putin summit ended without a breakthrough on halting the war in Ukraine. Asian markets ended mixed as traders remained cautious ahead of upcoming Federal Reserve Jerome Powell's Jackson Hole speech for clues on whether the U.S. central bank will cut interest rates next month.

Source: AceEquity

## NEWS BULLETIN

- **Inox Wind** has reported 17.30% rise in its net profit at Rs 86.71 crore for the quarter ended June 30, 2025 as compared to Rs 73.92 crore for the same quarter in the previous year. The total income of the company increased by 14.12% at Rs 722.43 crore for Q1FY26 as compared to Rs 633.04 crore for the corresponding quarter previous year.
- **Zaggle Prepaid Ocean Services** has reported 54.78% rise in its net profit at Rs 25.88 crore for the quarter ended June 30, 2025 as compared to Rs 16.72 crore for the same quarter in the previous year.
- **Ashok Leyland** has reported 12.97% rise in its net profit at Rs 593.73 crore for first quarter ended June 30, 2025 (Q1FY26) as compared to Rs 525.58 crore for the same quarter in the previous year.

## MARKET DRIVING SECTOR : AUTO



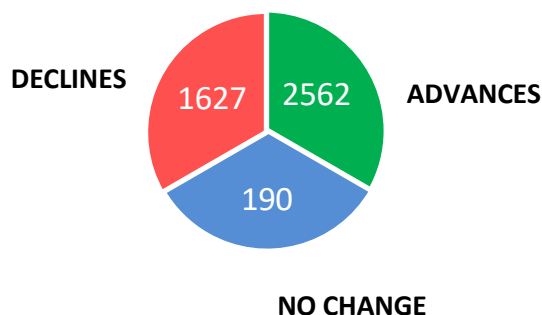
### S&P BSE: AUTO

CLOSING: 56,233.33

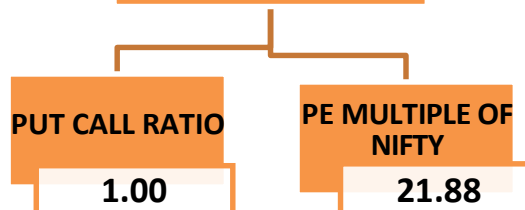
CHANGE: + 2,295.80

CHANGE: + 4.26%

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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