

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	81,306.85	81,501.06	81,799.06	81,364.86	81,635.91	+ 329.06	+0.40
NIFTY	24,870.10	24,949.15	25,021.55	24,894.35	24,967.75	+ 97.65	+0.39

INDICES START THE WEEK ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 329.06 points or 0.40% to settle at 81,635.91 and the Nifty was up by 97.65 points or 0.39% to settle at 24,967.75. The BSE Mid-Cap was up by 0.10% and BSE Small Cap was down by 0.02%. On the sectoral front, IT, FMCG, Auto, Metal, Realty, Oil & Gas, Consumer Durables and Healthcare were gaining indices; on the flip side, Capital Goods and Bank were losing indices. Infosys, TCS, HCL Tech, Tech Mahindra and Tata Motors were the top gainers on the Sensex; on the flip side, BEL, Asian Paint, Bharti Airtel, ICICI Bank and Kotak Bank 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
INFY	1,533.30	1,487.50	3.08
TCS	3,142.10	3,054.00	2.88
HCLTECH	1,505.00	1,466.30	2.64
WIPRO	254.40	248.64	2.32
HINDALCO	716.80	704.20	1.79

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ADANIENT	2,302.80	2,324.90	-0.95
APOLLOHOSP	7,848.50	7,922.50	-0.93
NESTLEIND	1,152.80	1,162.90	-0.87
BEL	372.30	374.85	-0.68
SBILIFE	1,849.70	1,859.00	-0.50

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	87,59,022	1,969.20	1,723.14
INFY	1,06,94,531	1,533.30	1,636.24
TCS	34,48,370	3,142.10	1,080.64
ICICIBANK	67,38,427	1,430.90	963.69
RELIANCE	59,79,407	1,413.70	844.57

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ETERNAL	2,08,80,241	320.50	668.59
WIPRO	1,63,91,069	254.40	418.02
TATASTEEL	1,63,76,542	159.65	261.40
JIOFIN	1,14,45,521	319.55	366.19
INFY	1,06,94,531	1,533.30	1,636.2



Indian equity benchmarks ended higher on Monday, supported by strong gains in IT stocks. Markets made positive start and remained higher throughout the session, as sentiments got boost with Federal Reserve Chair Jerome Powell signaling that the central bank could begin easing monetary policy next month in his widely anticipated annual speech in Jackson Hole, Wyoming. Support also came in as the commerce ministry said India and Australia concluded another round of negotiations for a comprehensive free trade agreement to strengthen economic ties between the two countries. Traders took support with Commerce and Industry Minister Piyush Goyal's statement that India is negotiating free trade agreements (FTAs) with several countries, including the European Union, the US, Chile, and Peru. Sentiments remained upbeat as RBI data showed that India's forex reserves rose by \$1.48 billion to \$695.10 billion during the week ended August 15, 2025.

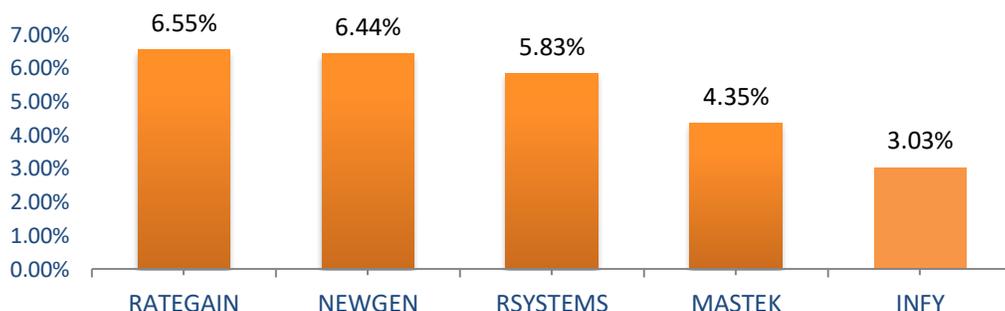
On Global front, European markets were trading mostly in red ahead of key inflation releases from Germany, France, Italy, and Spain due later in the week. Asian markets ended in green, as Federal Reserve Chair Jerome Powell's dovish signals at the Jackson Hole symposium opened the door to an interest rate cut next month.

Source: AceEquity

NEWS BULLETIN

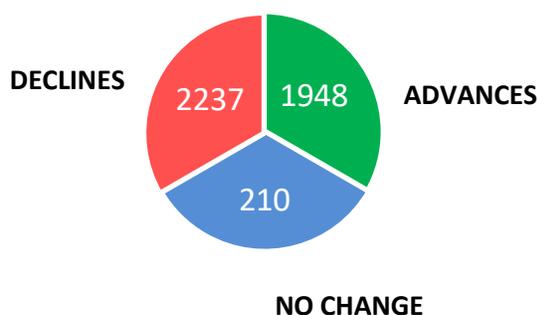
- **NBCC (India)** has been selected for development of Rajasthan Mandapam Convention Centre and other Urban development and innovation projects worth Rs 3,700 crore, from Government of Rajasthan.
- **Markolines Pavement Technologies** has received a Letter of Acceptance (LOA) worth around Rs 100 crore from Trans Metalite India. The order is for operation and production of patch repair work in the state of Andhra Pradesh. The order is to be executed within 5 years.
- **Tata Motors** has introduced 10 new commercial vehicles in partnership with DIMO, its authorised distributor in Sri Lanka. This significant launch underscores Tata Motors' commitment to provide advanced transport solutions and marks a major expansion of its presence in the country.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 35,581.15
CHANGE: + 812.28
CHANGE: + 2.34%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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