

| Index | Previous Close | Open | High | Low | Close | Change | Change% |
|--------|----------------|-----------|-----------|-----------|-----------|----------|---------|
| SENSEX | 80,786.54 | 80,754.66 | 80,775.71 | 80,013.02 | 80,080.57 | - 705.97 | -0.87 |
| NIFTY | 24,712.05 | 24,695.80 | 24,702.65 | 24,481.60 | 24,500.90 | - 211.15 | -0.85 |

TARIFF SHOCK ON MARKET

The 30-share BSE Sensex was down by 705.97 points or 0.87% to settle at 80,080.57 and the Nifty was down by 211.15 points or 0.85% to settle at 24,500.90. The BSE Mid-Cap was down by 1.09% and BSE Small Cap was down by 0.96%. On the sectoral front, Consumer Durables were gaining index; on the flip side, IT, Realty, Auto, Metal, Oil & Gas, FMCG, Healthcare, Capital Goods and Bank were losing indices. Titan, Larsen & Toubro, Maruti, Axis Bank and Reliance were the top gainers on the Sensex; on the flip side, HCL Tech, Infosys, Powergrid, TCS and HDFC 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 |
|-----------|-------------|--------------|------|
| TITAN | 3,632.00 | 3,594.00 | 1.06 |
| COALINDIA | 375.00 | 372.45 | 0.68 |
| HEROMOTO | 5,106.60 | 5,073.40 | 0.65 |
| LT | 3,564.10 | 3,541.30 | 0.64 |
| MARUTI | 14,798.00 | 14,714.00 | 0.57 |

Top Losers

| Name | Closing Pr. | Previous Pr. | %Ch |
|------------|-------------|--------------|-------|
| SHRIRAMFIN | 571.25 | 594.70 | -3.94 |
| HCLTECH | 1,450.20 | 1,492.80 | -2.85 |
| POWERGRID | 274.20 | 279.90 | -2.04 |
| TCS | 3,098.00 | 3,157.20 | -1.88 |
| TATACONSUM | 1,060.20 | 1,079.90 | -1.82 |

MARKET STATS (NSE)

Most Active (by value)

| Name | Qty | Pr. | Value CR |
|------------|-------------|----------|----------|
| HDFCBANK | 2,54,38,255 | 961.80 | 2,447.36 |
| ICICIBANK | 1,29,90,789 | 1,397.60 | 1,822.63 |
| RELIANCE | 1,31,61,813 | 1,390.90 | 1,817.36 |
| ETERNAL | 4,40,20,764 | 315.95 | 1,398.63 |
| SHRIRAMFIN | 2,00,25,147 | 571.25 | 1,156.51 |

Most Active (by volume)

| Name | Qty | Pr. | Value CR |
|------------|-------------|--------|----------|
| ETERNAL | 4,40,20,764 | 315.95 | 1,398.6 |
| HDFCBANK | 2,54,38,255 | 961.80 | 2,447.3 |
| TATASTEEL | 2,22,69,875 | 154.17 | 343.25 |
| SHRIRAMFIN | 2,00,25,147 | 571.25 | 1,156.5 |
| JIOFIN | 1,52,43,091 | 311.25 | 476.09 |



Indian equity benchmarks remained under pressure for second consecutive session on Thursday, with Nifty and Sensex closing near day's low points, amid continued selling by foreign institutional investors. Markets made a negative start and remained lower throughout day, after U.S. President Donald Trump's 50 percent tariffs on Indian goods came into effect from August 27, 2025. Traders remained cautious as the rating agency ICRA expects India Inc to report muted revenue growth of 5-6 per cent in the second quarter of the fiscal (Q2FY26). Traders overlooked Union minister Kirti Vardhan Singh's statement that India's bilateral trade with Africa has crossed the magical figure of \$100 billion in 2024-25 compared to \$56 billion in 2019-2020. Ongoing foreign fund outflows also dampened market sentiments. Foreign institutional investors (FIIs) offloaded shares worth Rs. 6,516.49 crore on a net basis on Tuesday.

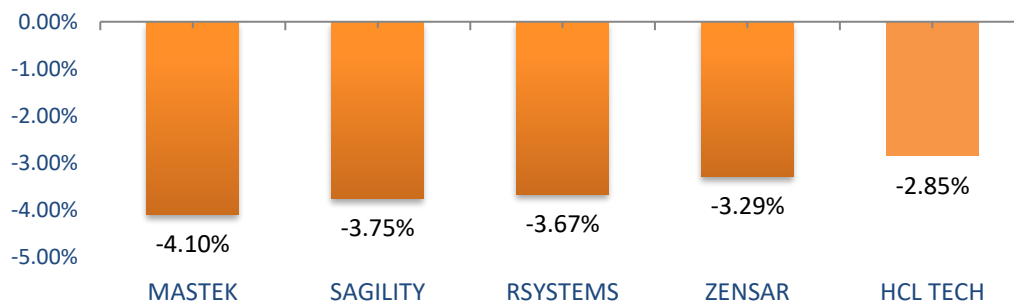
On Global front, European markets were trading mostly in red, despite Nvidia's positive results helped ease AI slowdown fears. Asian markets ended mostly in green amid reports that China's industrial profits declined at a slower pace in the January to July period.

Source: AceEquity

NEWS BULLETIN

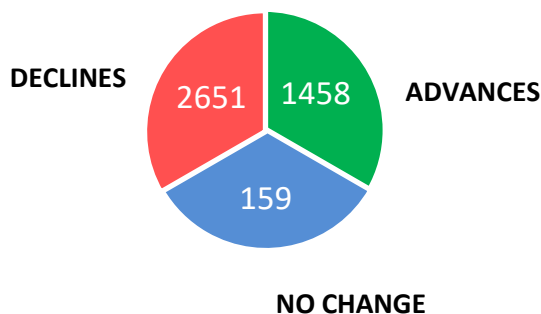
- **Power Mech Projects** has secured order worth Rs 370.84 crore (excluding GST and BOCW cess) from Mahan Energen (MEL), one of the subsidiaries of Adani Power. The order is for the execution of civil works and erection of prefabricated structural steel.
- **Shiv Texchem** has received Letter of Acceptance from 3N Composite Products LLP/Orson Resins and coatings (the Authority), dated July 03, 2025, for the Supply of Styrene Monomer. The Cost of the Contract is Rs 9.02 crore.
- **HFCL's** material subsidiary -- HTL has received the contract worth around Rs 101.82 crore from Indian Army for supply of tactical optical fiber cable and related accessories. The order is to be executed by August, 2026.

MARKET DRIVING SECTOR : IT

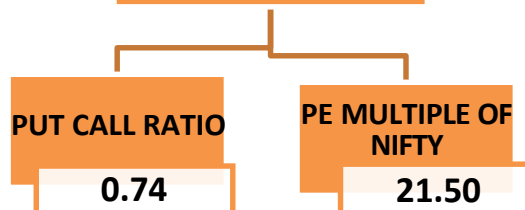


S&P BSE: IT
CLOSING: 34,764.96
CHANGE: - 592.46
CHANGE: - 1.68%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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