

30<sup>th</sup> Aug 2025



| Index    | Previous Close | Open      | High      | Low       | Close     | Change    | Change% |
|----------|----------------|-----------|-----------|-----------|-----------|-----------|---------|
| SENSEX   | 81,306.85      | 81,501.06 | 81,799.06 | 79,741.76 | 79,809.65 | -1,497.20 | -1.84   |
| NIFTY 50 | 24,870.10      | 24,949.15 | 25,021.55 | 24,404.70 | 24,426.85 | -443.25   | -1.78   |

## FRESH US TRADE TARIFFS DAMPENED INVESTOR MOOD

Indian equity benchmark ended on a red note in the week ended 30<sup>th</sup> Aug, 2025. Key indices were negative in three out of four sessions of the week. The S&P BSE Sensex was down by 1,497.20 points or 1.84% to settle at 79,809.65 in the week ended 30<sup>th</sup> Aug, 2025. The CNX Nifty was down by 443.25 points or 1.78% to settle at 24,426.85. The BSE Mid-Cap index was down by 1247.97 or 2.72% to settle at 44,642.31. The BSE Small-Cap index was down by 1,553.09 points or 2.93% to settle at 51,449.23.

| Top Gainers   |             |              |      |
|---------------|-------------|--------------|------|
| Name          | Closing Pr. | Previous Pr. | %Ch  |
| MARUTI        | 14,791.00   | 14,349.00    | 3.08 |
| EICHER MOTORS | 6,103.00    | 5,924.50     | 3.01 |
| ITC LTD       | 409.75      | 398.30       | 2.87 |
| HERO MOTOCORP | 5,087.70    | 4,997.90     | 1.80 |
| HINDUNILVR    | 2,659.80    | 2,629.90     | 1.14 |

| Top Losers       |             |              |       |
|------------------|-------------|--------------|-------|
| Name             | Closing Pr. | Previous Pr. | %Ch   |
| M&M              | 3,199.50    | 3,403.00     | -5.98 |
| SHRIRAM FINANCE  | 580.25      | 615.85       | -5.78 |
| APOLLO HOSPITALS | 7,610.00    | 7,922.50     | -3.94 |
| RELIANCE         | 1,357.20    | 1,409.20     | -3.69 |
| ADANI ENTERPRISE | 2,244.70    | 2,324.90     | -3.45 |

## MARKET STATS

| Most Active (by value) |           |          |              |
|------------------------|-----------|----------|--------------|
| Name                   | Avg Value | Pr.      | Qty          |
| ETERNAL LTD            | 17,764.71 | 313.95   | 5,65,8451.84 |
| HDFC BANK              | 7,108.25  | 951.60   | 7,46,978.40  |
| RELIANCE               | 6,792.15  | 1,357.20 | 5,00,453.24  |
| INFOSYS LTD            | 5,922.75  | 1,469.60 | 4,03,017.68  |
| ICICI BANK             | 5,167.51  | 1,397.80 | 3,69,688.80  |

| Most Active (by volume) |           |        |              |
|-------------------------|-----------|--------|--------------|
| Name                    | Avg Value | Pr.    | Qty          |
| ETERNAL LTD             | 17,764.71 | 313.95 | 5,65,8451.84 |
| TATA STEEL              | 1,162.30  | 154.48 | 7,52,393.76  |
| HDFC BANK               | 7,108.25  | 951.60 | 7,46,978.40  |
| ITC LTD                 | 2,535.65  | 409.75 | 6,18,828.08  |
| SHRIRAM FIN             | 3,316.75  | 580.25 | 5,71,606.88  |



## INSTITUTIONAL NET POSITION



|                    |               |
|--------------------|---------------|
| FII's Cash         | • - 21,151.90 |
| FII's Index Future | • - 5,204.60  |
| FII's Stock Future | • + 1,232.73  |
| DII's Cash         | • + 28,645.04 |

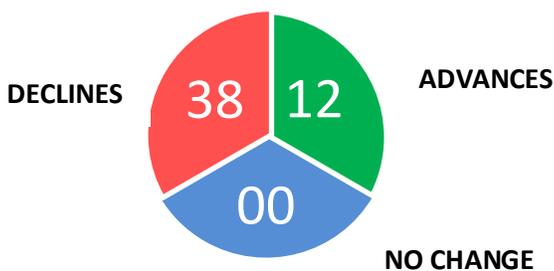
On Monday, 25 Aug 2025, Indian equity benchmarks ended higher on Monday, supported by strong gains in IT stocks. On Tuesday, 26 Aug, 2025, Indian equity benchmarks witnessed heavy selling on Tuesday, with both Nifty and Sensex closing over one percent cut, amid weak global cues. On Wednesday, 27 Aug, 2025, Indian Equity markets were closed. On Thursday, 28 Aug, 2025, 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 FII's. The S&P BSE Sensex was down by 705.97 points or 0.87% to 80,080.57. On Friday, 29 Aug 2025, The S&P BSE Sensex was down by 270.92 points or 0.34% to 79,809.65.

| Company Name                 | Quantity    | Trade Price |
|------------------------------|-------------|-------------|
| Royal Orchid Hotels          | 1,42,490    | 521.13      |
| InterGlobe Aviation          | 25,20,000   | 5814.71     |
| RBL Bank                     | 32,78,899   | 250.57      |
| Protean eGov Tech            | 2,08,269    | 897.98      |
| Ola Electric                 | 5,66,50,986 | 54.28       |
| Mangal Electrical Industries | 4,56,683    | 538.23      |
| Edelweiss Financial          | 64,30,780   | 100         |

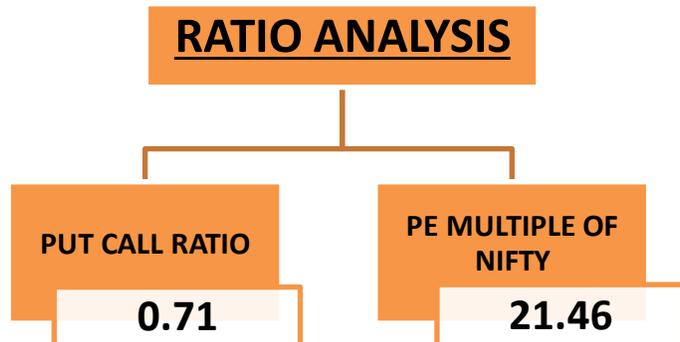


**BULK & BLOCK**

### NIFTY MARKET BREADTH (W) - NEGATIVE



### RATIO ANALYSIS





## NEWS BULLETIN

- **Avantel** has received a purchase order worth Rs 2.84 crore (including taxes) on August 29, 2025, for supply of satcom products from M/s. Chowgule and Company. The warranty for the product will be 24 months. The order is to be executed by March 15, 2026.
- **Shiv Texchem** has received Letter of Acceptance (LoA) from Innovative Resins for the supply of Styrene Monomer. The order is valued at Rs 4.21 crore. The order is to be executed by December 2025. The company has received this LoA on July 04, 2025.
- **TVS Motor Company** has launched its new electric offering -- TVS Orbiter. Designed to redefine everyday commute, the TVS Orbiter combines several segment-first features such as a 158 km IDC range, cruise control, 34-litre boot space, hill hold assist, and advanced connected features.
- **Aarvi Encon** has been awarded the work contract worth Rs 9.50 crore by one of the leading fertilizer manufacturing and supplying company in India on August 28, 2025 for miscellaneous planned & unplanned maintenance work in mechanical department at manufacturing plant in India.

### MARKET DRIVING SECTOR : REALTY



#### NIFTY REALTY

**CLOSING: 870.75**

**CHANGE: - 38.90**

**CHANGE: - 4.28%**

### MARKET DRIVING SECTOR : OIL & GAS



#### NIFTY OIL & GAS

**CLOSING: 10,789.75**

**CHANGE: - 336.35**

**CHANGE: - 3.02%**

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