

| Index  | Previous Close | Open      | High      | Low       | Close     | Change   | Change% |
|--------|----------------|-----------|-----------|-----------|-----------|----------|---------|
| SENSEX | 79,809.65      | 79,828.99 | 80,406.84 | 79,818.38 | 80,364.49 | + 554.84 | + 0.70  |
| NIFTY  | 24,426.85      | 24,432.70 | 24,635.60 | 24,432.70 | 24,625.05 | + 198.20 | + 0.81  |

## BOURSES START THE WEEK ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 554.84 points or 0.70% to settle at 80,364.49 and the Nifty was up by 198.20 points or 0.81% to settle at 24,625.05. The BSE Mid-Cap was up by 1.64% and BSE Small Cap was up by 1.49%. On the sectoral front, Auto, Consumer Durables, IT, Realty, Metal, Oil & Gas, FMCG, Healthcare, Capital Goods and Bank were gaining indices; on the flip side, there were no losing index. Mahindra & Mahindra, Tata Motors, Trent, Eternal and Asian Paint were the top gainers on the Sensex; on the flip side, Sunpharma, ITC, Hindustan Unilever, Titan and Reliance 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  |
|------------|-------------|--------------|------|
| BAJAJ-AUTO | 8,978.00    | 8,631.50     | 4.01 |
| M&M        | 3,312.00    | 3,199.50     | 3.52 |
| HEROMOTO   | 5,250.00    | 5,087.70     | 3.18 |
| EICHERMOT  | 6,292.00    | 6,103.00     | 3.10 |
| TATAMOTORS | 689.70      | 669.00       | 3.09 |

### Top Losers

| Name       | Closing Pr. | Previous Pr. | %Ch   |
|------------|-------------|--------------|-------|
| SUNPHARMA  | 1,564.00    | 1,594.50     | -1.91 |
| ITC        | 405.55      | 409.75       | -1.03 |
| HINDUNILVR | 2,645.00    | 2,659.80     | -0.56 |
| TITAN      | 3,618.00    | 3,628.80     | -0.30 |
| CIPLA      | 1,585.90    | 1,589.40     | -0.22 |

## MARKET STATS (NSE)

### Most Active (by value)

| Name      | Qty         | Pr.      | Value CR |
|-----------|-------------|----------|----------|
| HDFCBANK  | 2,01,78,344 | 950.80   | 1,918.17 |
| ETERNAL   | 4,78,88,390 | 321.35   | 1,524.77 |
| RELIANCE  | 1,12,32,238 | 1,355.00 | 1,520.83 |
| SUNPHARMA | 93,66,820   | 1,564.00 | 1,467.41 |
| M&M       | 35,25,726   | 3,312.00 | 1,155.85 |

### Most Active (by volume)

| Name     | Qty         | Pr.      | Value CR |
|----------|-------------|----------|----------|
| ETERNAL  | 4,78,88,390 | 321.35   | 1,524.7  |
| HDFCBANK | 2,01,78,344 | 950.80   | 1,918.1  |
| ITC      | 1,22,68,090 | 405.55   | 498.48   |
| JIOFIN   | 1,14,86,206 | 314.40   | 357.94   |
| RELIANCE | 1,12,32,238 | 1,355.00 | 1,520.8  |



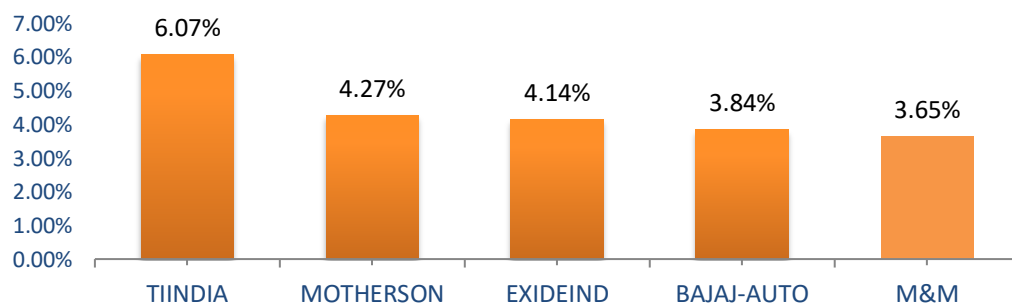
Indian equity benchmarks snapped their three-day losing streak on Monday, with both the Nifty and Sensex closing with significant gains, supported by a strong rally in IT and Auto stocks. Indices made a positive start and remained in the green throughout the day, as upbeat India Manufacturing Purchasing Managers' Index (PMI) data and robust GDP figures boosted investors' sentiments. Traders took support after India's GDP grew by a stronger-than-expected 7.8 per cent in April-June, its fastest pace in five quarters, before US President Donald Trump imposed tariffs that now cloud the outlook, threatening key exports like textiles. Some support came as Commerce and Industry Minister Piyush Goyal has said that India is negotiating a bilateral trade agreement with the US, indicating that the steep 50 per cent tariff imposed by America on Indian goods will not have much impact on the country's economy. Sentiments got boost as S&P Global data showed India's manufacturing sector saw a strong growth in August, with the HSBC India Manufacturing Purchasing Managers' Index (PMI) rising to 59.3 from 59.1 in July.

On Global front, European markets were trading in green, after a U.S. appeals court ruled that many of President Donald Trump's tariffs, which have upended global trade, were illegal.  
Source: AceEquity

## NEWS BULLETIN

- **R.P.P. Infra Projects** has been awarded a significant contract by Bharat Heavy Electricals (BHEL). The total value of the contract is Rs 1,125.94 crore, reflecting the scale and importance of this order. The scope of the contract involves the fabrication and supply of high-quality factory finished structures to various BHEL project sites in India.
- **Archies** has secured an export order worth Rs 1.04 crore for supply of Paper Bag. The company has secured this order from HOBBY LOBBY.
- **TVS Motor** company's total exports registered a growth of 35% with sales increasing from 99,976 units in August 2024 to 135,367 units in August 2025. Two-wheeler exports grew by 36% with sales increasing from 89,768 units in August 2024 to 121,926 units in August 2025.

## MARKET DRIVING SECTOR : AUTO



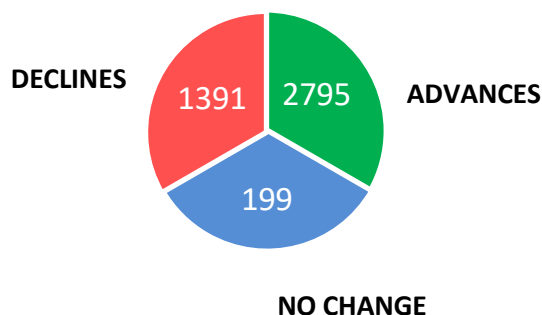
### S&P BSE: AUTO

CLOSING: 57,457.50

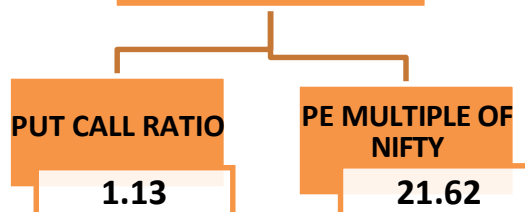
CHANGE: + 1,497.65

CHANGE: + 2.68%

## MARKET BREADTH – POSITIVE



## RATIO ANALYSIS



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