

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,364.49	80,520.09	80,761.14	80,008.50	80,157.88	- 206.60	- 0.26
NIFTY	24,625.05	24,653.00	24,756.10	24,522.35	24,579.60	- 45.45	- 0.18

INDICES SHUT THE DAY WITH MINOR LOSS

The 30-share BSE Sensex was down by 206.60 points or 0.26% to settle at 80,157.88 and the Nifty was down by 45.45 points or 0.18% to settle at 24,579.60. The BSE Mid-Cap was up by 0.27% and BSE Small Cap was up by 0.64%. On the sectoral front, FMCG, Realty, Metal, Oil & Gas, Capital Goods and Bank were gaining indices; on the flip side, Auto, Consumer Durables, IT, Healthcare and Bank were losing indices. 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 negative note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TATACONSUM	1,105.50	1,075.70	2.77
NESTLEIND	1,200.50	1,174.40	2.22
POWERGRID	286.00	279.85	2.20
NTPC	336.65	330.70	1.80
TATASTEEL	158.45	156.17	1.46

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
DRREDDY	1,250.00	1,279.90	-2.34
M&M	3,238.00	3,315.40	-2.33
ICICIBANK	1,391.00	1,411.00	-1.42
ASIANPAINT	2,538.00	2,570.20	-1.25
CIPLA	1,568.00	1,587.20	-1.21

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
RELIANCE	1,15,17,006	1,367.50	1,582.76
ETERNAL	4,88,78,436	322.85	1,580.29
HDFCBANK	1,41,96,320	944.70	1,346.93
M&M	30,73,407	3,238.00	1,005.07
ICICIBANK	71,63,073	1,391.00	1,004.23

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	4,88,78,436	322.85	1,580.2
TATASTEEL	2,12,02,113	158.45	334.82
ITC	1,98,08,255	407.00	804.95
POWERGRID	1,69,83,677	286.00	486.11
HDFCBANK	1,41,96,320	944.70	1,346.9



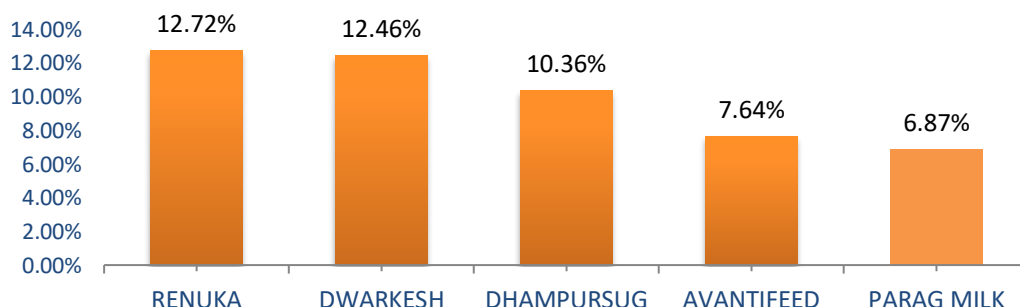
Indian equity benchmarks ended in negative terrain on Tuesday, due to selling in heavy weight banking stocks. Markets made positive start, as traders took some support with the commerce ministry stating that India and the UAE have discussed ways to enhance and facilitate trade in pharmaceuticals and healthcare products with an aim to boost economic ties. However, in late afternoon session, markets turned negative and ended with minor losses, as traders remained cautious amid upcoming Goods and Services Tax (GST) Council meeting, which will be held on September 3 and 4, 2025. The GST Council is scheduled to hold a two-day meeting to discuss the revisions of tax slabs. Traders took note of India's current account deficit (CAD) narrowed to 0.2 per cent of GDP, or \$2.4 billion, during the April-June period of 2025-26 compared to 0.9 per cent of the GDP, or \$8.6 billion, in the year-ago period, helped by services exports.

On Global front, European markets were trading mostly in red, after Eurostat data showed Eurozone inflation rose to 2.1 percent last month, climbing above the European Central Bank's 2 percent target for the first time since April driven by higher prices for food, alcohol and tobacco. Asian markets ended mixed amid much uncertainty around tariffs and geopolitical tensions.
Source: AceEquity

NEWS BULLETIN

- **Sanmit Infra** has secured work order of 300000 SQMT Micro Surfacing Work in Pune PN- 35 Projects. The order is valued at around Rs 4.24 crore. . The scope of work includes providing and laying of Micro Surfacing course.
- **Sattrix Information Security** has received an order to Supply of Security Operations Center (SOC) Services from SBI Cards and Payment Services. Broad consideration or size of the order(s)/contract(s) is Rs 55.63 lakh. The said order is expected to be completed in 3 months.
- **Refex Industries** has procured an order for transportation of Pond ash from Andhra Pradesh Power Development Company. The broad consideration or size of the order is Rs 25 crore and is to be executed within 3 months.

MARKET DRIVING SECTOR : FMCG



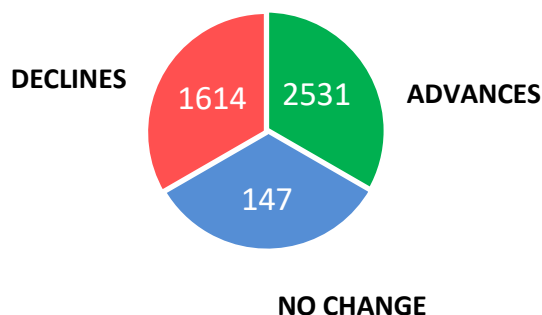
S&P BSE: FMCG

CLOSING: 20,863.03

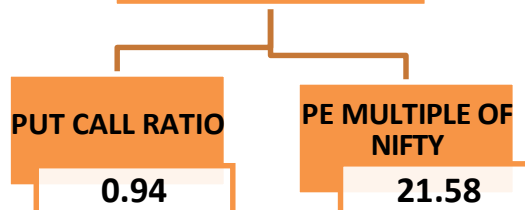
CHANGE: + 230.92

CHANGE: + 1.12%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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