

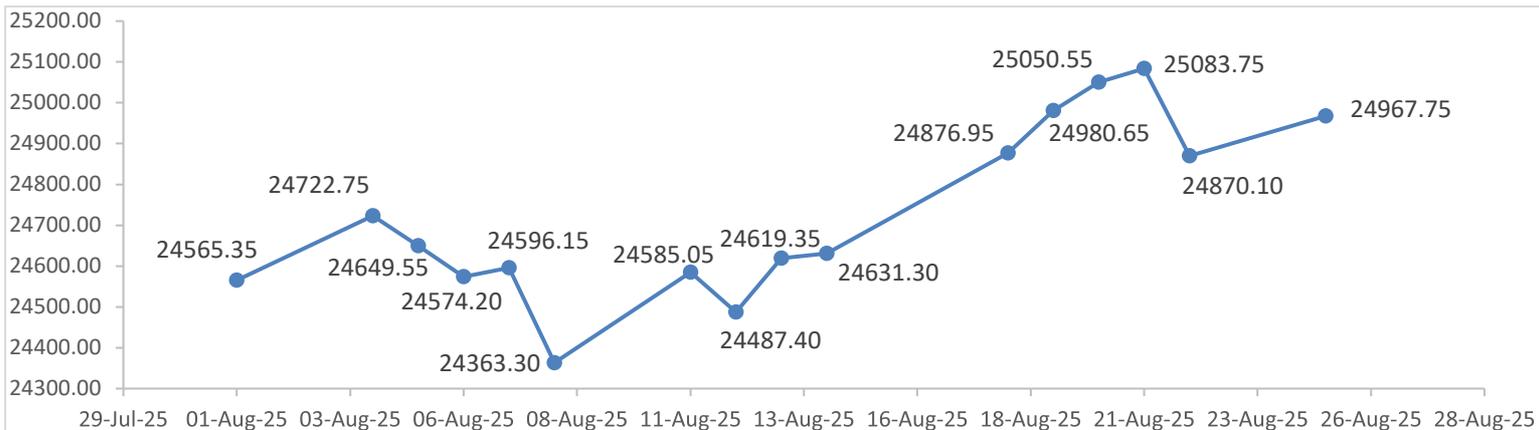
Nifty 50

24,426.85 **-341.50**
(-1.38%)

52 Week High: 26,277.4

52 Week Low: 21,743.6

Resistance		Support	
R1	24,951.1	S1	24,327.5
R2	25,143.7	S2	24,134.9
R3	25,455.4	S3	23,823.1



Sectorial Indices	Prev. Close (31-Jul '25)	Close (29-Aug '25)	% Change (1M)
Nifty Auto	23,655	24,960	5.52%
Nifty PSU Bank	6,850	6,756	-1.39%
Nifty Pharma	22,771	21,804	-4.25%
Nifty IT	35,301	35,181	-0.34%
Nifty FMCG	55,812	56,141	0.59%
Nifty Metal	9,285	9,154	-1.41%
Nifty Fin Serv	26,649	25,567	-4.06%
Nifty Cons	38,263	38,590	0.85%

Top Gainers	Prev. Close (31-Jul '25)	Close (29-Aug '25)	% Change (1M)
HBLENGINE	587.20	807.10	37.44%
OLAELEC	41.31	54.05	30.83%
UNOMINDA	1041.40	1279	22.81%
HEROMOTOCO	4260.70	5087.70	19.41%
MARUTI	12608	14791	17.31%

Top Losers	Prev. Close (31-Jul '25)	Close (31-Aug '25)	% Change (1M)
PGEL	811.65	533.10	-34.32%
BAYERCROP	6322.50	5231.50	-17.26%
PRAJIND	467.05	391.30	-16.22%
KALYANKJIL	594.70	504.15	-15.23%
BHEL	238.45	208.01	-12.77%

*Nifty 500 constraint

Global Indices	Prev. Close (31-Jul '25)	Close (29-Aug '25)	% Change (1M)
Dow Jones	44,130	45,544	3.20%
Nasdaq	21,122	21,455	1.57%
FTSE	9,132	9,187	0.60%
Hang Seng	24,773	25,077	1.22%
USD/INR	87.48	88.17	0.77%
GBP/INR	115.53	117.11	0.46%

Net Flow	Amount (Rs Cr)
FII	-46,902.92
DII	94,828.55
MF Equity	65,693.66
MF Debt	-63,776.15

Index	Prev. Close (31-Jul '25)	Close (31-Aug '25)	% Change (1M)
SENSEX	81,185	79,809	-1.69%
NIFTY 50	24,768	24,426	-1.38%
BANK NIFTY	55,961	53,655	-4.12%

Commodities	Prev. Close (31-Jul '25)	Close (31-Aug '25)	% Change (1M)
Gold	93,966	95,875	1.96%
Silver	94,937	97,015	1.58%
Crude (WTI)	58.21	60.79	4.56%

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FPIs Pull ₹232.9 bn from Financials; Nifty Slips 1.4%:

Foreign portfolio investors withdrew ₹232.9 billion (~\$2.7 billion) from Indian financial stocks in August, the heaviest sectoral outflow in seven months, based on NSDL data. Selling was linked to weaker bank margins, U.S. tariff uncertainty, underwhelming June-quarter earnings and relatively better valuations in other Asian markets. The Nifty Financial Services index fell 4.1% in August, pulling the Nifty 50 down 1.4%. Overall FPI equity outflows were about \$4 billion, also a seven-month high; FPIs net sold IT and oil & gas, while telecom and autos saw inflows.

GST Momentum Holds: August Mop-Up ₹1.86 Trillion:

India's gross GST mop-up reached ₹1.86 trillion in August, up 6.5% year-on-year. Net GST revenue after refunds was about ₹1.67 trillion, 10.7% higher than a year earlier, with domestic collections growing 9.6% while import-related GST dipped 1.2%. Sequentially, August eased from July's ₹1.96 trillion, but August marked the eighth straight month above ₹1.8 trillion, underscoring resilient underlying activity despite external headwinds. Policymakers are set to review rate rationalisation at the upcoming GST Council meeting, keeping the near-term revenue trajectory in focus.

Buybacks Blast Past \$1 Trillion—Fastest Pace on Record:

U.S. companies have surpassed \$1 trillion in announced share repurchases by late August—the quickest run-rate ever. July alone set a monthly record with roughly \$166 billion in new authorizations. For 2025, completed buybacks are tracking above \$1.1 trillion, with total announced plans near \$1.3 trillion. Mega-cap technology and energy names continue to dominate, supporting earnings per share by shrinking share counts and offsetting new equity supply. Despite higher financing costs and policy scrutiny, strong cash flows and margins should keep buybacks underpinning equity demand through Q4.

NSE Shifts Weekly Derivatives Expiry to Tuesday, Effective End-August:

The National Stock Exchange has revised the expiry day for index and stock derivatives to Tuesday, per circulars dated June 23 and June 25, 2025. Nifty weekly options now expire Tuesdays; Nifty and Bank Nifty monthly/quarterly/half-yearly move to the last Tuesday, while FINNIFTY, MIDCPNIFTY, NIFTYNXT50 and single-stock monthly contracts also shift. Existing expiries through Aug. 31, 2025 remain unchanged; long-dated Nifty/Bank Nifty options (Sept. 2025 onward) were realigned on July 31 (EOD). Newly created contracts with expiries on/after Sept. 1 adopt Tuesday; first weekly Nifty Tuesday expiry is Sept. 2, 2025.

IPO Update :-

Company Name	IPO Date (August'25)	Market Response
M&B Engineering	30 July – 01 Aug	34.36x oversubscribed
Sri Lotus Developers	30 July – 01 Aug	21.77x oversubscribed
Highway Infrastructure	05 Aug – 07 Aug	70.45x oversubscribed
Reegal Resources	12 Aug – 20 Aug	57.75x oversubscribed

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