

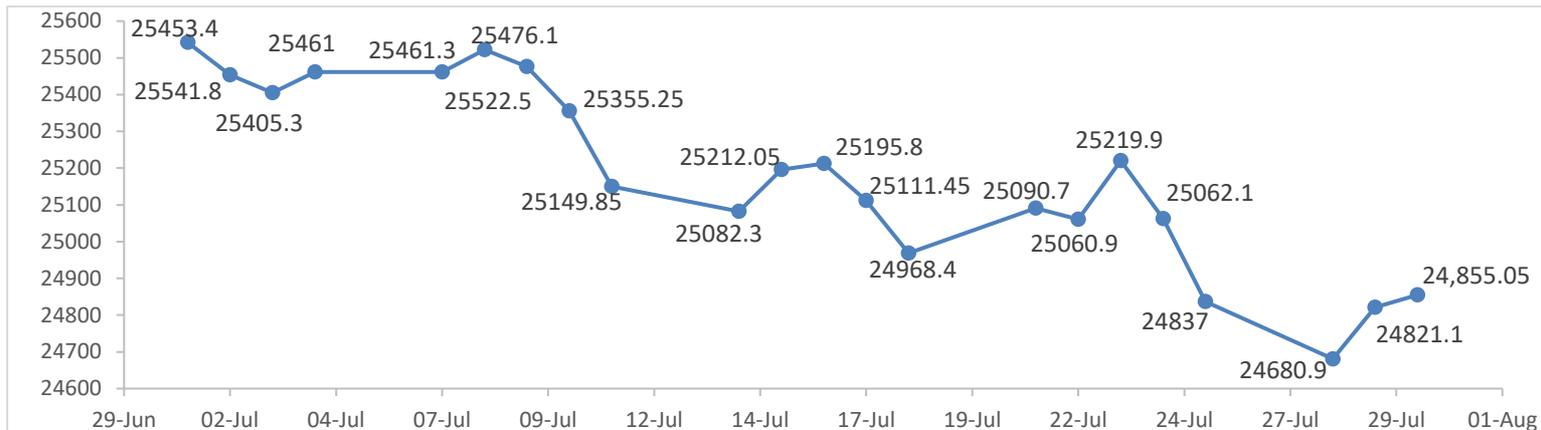
Nifty 50

24,768.35 -86.70
(0.35%)

52 Week High: 26,277.4

52 Week Low: 21,281.4

Resistance		Support	
R1	24,909.43	S1	24,663.80
R2	24,985.20	S2	24,587.93
R3	25,108.12	S3	24,465.12



Sectorial Indices	Prev. Close (30-June'25)	Close (31-July'25)	% Change (1M)
Nifty Auto	23,872	23,655.85	-0.90%
Nifty PSU Bank	7,202	6,850.95	-4.88%
Nifty Pharma	22,038	22,771.05	3.33%
Nifty IT	38,950	35,301.60	-9.38%
Nifty FMCG	54,883	55,812.15	1.69%
Nifty Metal	9,534	9,285.45	-2.61%
Nifty Fin Serv	27,174	26,649.95	-1.93%
Nifty Cons	38,441	38,263.80	-0.46%

Top Gainers	Prev. Close (30-June'25)	Close (31-July'25)	% Change (1M)
SYRMA	567.20	756	33.28%
SUMICHEM	529.60	648.70	22.49%
ANANDRATHI	2159.70	2645.60	22.51%
BOSCHLTD	32680	40385	23.59%
NETWEB	1845.20	2031.50	10.10%

Top Losers	Prev. Close (30-June'25)	Close (31-July'25)	% Change (1M)
IEX	193.11	135.30	-29.93%
NEWGEN	1171.80	848.90	-27.58%
RPOWER	70.29	52.73	-25.00%
PNBHOUSING	1109.40	986.20	-11.11%
ZENTEC	1981.30	1464.10	-26.10%

*Nifty 500 constraint

Global Indices	Prev. Close (30-June'25)	Close (31-July'25)	% Change (1M)
Dow Jones	44,094	44,461.28	0.83%
Nasdaq	20,369	21,129.67	3.73%
FTSE	8,760	9,136.94	4.30%
Hang Seng	24,072	24,773.33	2.91%
USD/INR	85.71	87.49	2.08%
GBP/INR	117.69	115.54	-1.83%

Net Flow	Amount (Rs Cr)
FII	-47,666.68
DII	60,939.16
MF Equity	46,514.36
MF Debt	-11,657.21

Index	Prev. Close (30-June'25)	Close (31-July'25)	% Change (1M)
SENSEX	83,606.46	81,185.58	-2.89%
NIFTY 50	25,517.05	24,768.35	-2.94%
BANK NIFTY	57,312.75	55,961.95	-2.36%

Commodities	Prev. Close (30-June'25)	Close (31-July'25)	% Change (1M)
Gold	98,740	98,087	-0.66%
Silver	106,292	109,972	3.47%
Crude (WTI)	65.45	69.41	6.04%

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India-US Trade Tensions Rise as US Imposes 25% Tariffs on Indian Imports:

On July 30, 2025, US President Donald Trump announced a 25% tariff on Indian goods starting August 1, citing India's high tariffs on US products and concerns over India's imports of Russian oil and military equipment. India's government affirmed its commitment to fair trade negotiations and is preparing for talks with the US delegation in August. The announcement has caused volatility in Indian markets, with Sensex and Nifty dipping as investors react. Both countries continue to seek a balanced trade deal amid this escalation, which reflects the complex economic and geopolitical landscape in 2025.

India's Fiscal Deficit at 17.9% of Full-Year Target:

India's fiscal deficit for April-June 2025 reached Rs 2.8 lakh crore, or 17.9% of the full-year target of Rs 15.69 lakh crore, up from 8.4% a year ago. Government spending totaled 24.1% of the annual budget, with capital expenditure hitting one-quarter of the year's planned outlay, signaling a strong push on infrastructure. Net tax revenue reached Rs 5.4 lakh crore, slightly slower than last year, while non-tax revenues rose due to higher dividends. The data reflects balanced fiscal management as the government aims to contain the deficit at 4.4% of GDP for 2025-26

RBI Sees 10.7% Rise in Digital Payments, Buys More Gold:

The Reserve Bank of India (RBI) reported a 10.7% increase in digital payments as of March 2025, driven by improved payment infrastructure and wider acceptance across India. The Digital Payments Index rose to 493.22 from 445.50 the previous year, reflecting strong growth. In June 2025, RBI also bought half a ton of gold, raising gold's share to 12.1% of India's foreign exchange reserves. This move diversifies reserves amid global economic challenges.

Jane Street Scandal Triggers 35% Plunge in NSE Index Options Turnover:

NSE witnessed a sharp 35% decline in index options premium turnover, following regulatory action against Jane Street for alleged market manipulation. On the July 17 expiry, turnover dropped to ₹39,626 crore from a June average of ₹60,605 crore. This downturn follows Sebi's ban on Jane Street, citing manipulative trading practices that skewed prices and impacted smaller investors. As a result, market activity and investor confidence have been significantly shaken, with combined losses of ₹1.4 lakh crore in NSE and BSE market capitalization. Jane Street has appealed the ban, but regulatory scrutiny continues to weigh on the market.

IPO Update :-

Company Name	IPO Date (July'25)	Market Response
Anthem Biosciences Ltd.	14 July – 16 July	67.42x oversubscribed
GNG Electronics Ltd.	23 July – 25 July	150.21x oversubscribed
Shanti Gold International	25 July – 29 July	80.78x oversubscribed
Aditya Infotech Ltd.	29 July – 31 July	106.23x oversubscribed

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