

## Market Commentary

### Overnight global action:

On 8th July 2026, US market delivered a mixed bag performance with S&P500 down by -21.26 pts (-0.28%), Dow Jones down by -577.06 pts (-1.09%) and Nasdaq up by +79.55 pts (0.27%). Gift Nifty grew by 86 pts (0.36%) indicating Indian markets will open positively.

Advance-Decline ratio on NSE was 698:2631 and on BSE was 971:3331 which showed weakness in the overall markets.

### Index Options Data Analysis:

Sensex max call OI and put OI both are at 76500 with PCR of 0.56

Nifty max call OI and put OI both are at 24200 with PCR of 0.6

Bank Nifty max call OI and put OI both are at 57000 with PCR of 0.8

### Securities in Ban for F&O Trade:

NIL

### Sector Performance:

NIFTY OIL & GAS index declined by -2.23% driven by Aegis Logistics Ltd. (-10%) and Aegis Vopak Terminals Ltd. (-9.99%)

NIFTY PSU BANK index declined by -2.72% driven by Bank Of India (-5.1%) and Bank Of Maharashtra (-5.12%)

NIFTY METAL index declined by -0.91% driven by Steel Authority Of India Ltd. (-2.2%) and JSW Steel Ltd. (-2.2%)

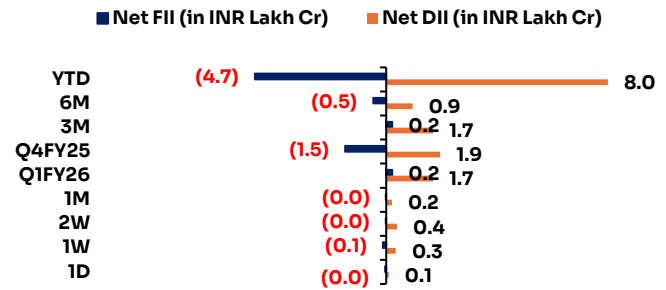
NIFTY PRIVATE BANK index declined by -0.1% driven by Bandhan Bank Ltd. (-4.4%) and RBL Bank Ltd. (-4.42%)

NIFTY REALTY index declined by -1.87% driven by Aditya Birla Real Estate Ltd. (-4.1%) and Godrej Properties Ltd. (-4.07%)

Now listen to the daily market update



Fund Flow	Buy	Sell	Net
FII/FPI	17,464	15,501	1,963
DII	19,165	18,375	790



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	23,964	0.4%	-8.7%	21.7
Sensex 30	76,504	-2.2%	-10.2%	20.0
Nifty 50	23,882	-2.1%	-8.6%	21.7
India VIX	15	24.8%	53.5%	
Nifty Bank	56,743	-2.5%	-4.8%	16.7
Nifty Next 50	70,899	-1.9%	2.2%	70.9
Nifty 500	22,908	-2.0%	-4.0%	21.5
Nifty Mid 100	61,323	-1.6%	1.4%	31.5
Nifty Small 250	17,598	-2.0%	5.5%	29.6
USD/INR	96	0.7%	6.4%	
India 10Y	6.8%			
India 2Y	6.1%			
India 1Y	5.9%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,483	-0.3%	9.3%	32.4
Dow Jones	52,348	-1.1%	8.9%	25.3
Nasdaq 100	29,253	0.3%	15.9%	48.0
FTSE 100	10,489	-1.7%	5.6%	16.5
CAC 40	8,253	-2.2%	1.3%	24.2
DAX	24,897	-2.2%	1.7%	26.0
Nikkei 225	67,913	1.6%	35.1%	36.2
Hang Seng	24,199	3.0%	-5.6%	11.8
Shanghai Cor	3,971	-0.5%	0.1%	18.0
KOSPI	7,513	3.7%	78.7%	37.2
S&P/ASX 200	8,708	-0.9%	-0.1%	23.0

## Stocks in the News

### EXIDE INDUSTRIES LTD. (CMP: 421, MARKET CAP: 35815 Cr., SECTOR: BATTERIES)

The stock stood out as a strong performer against broader market weakness, gaining 1.21% on the BSE to close at ₹419.40 and 1.59% on the NSE to end at ₹421.10. Institutional buying accelerated following a positive operations update regarding their upcoming lithium-ion cell manufacturing facility expansion in Bengaluru. Revenue guidance for the electric mobility division has been upscaled by 12% for the second half of the financial year. The stock charts reflect an intermediate bullish continuation pattern with immediate support holding at ₹410.

[SolarQuarter](#)

### NTPC GREEN ENERGY LTD. (CMP: 93, MARKET CAP: 78129 Cr., SECTOR: POWER GENERATION/DISTRIBUTION)

The recently listed renewable player remained resilient in positive territory, registering modest gains of 0.11% on the BSE and 0.14% on the NSE to close at ₹92.80. The company added 500 MW of operational solar capacities across western grids, increasing its total green generation asset pipeline to 4.2 GW. Operating EBITDA margins are projected to stabilize at 82% over the next two fiscal years due to long-term power purchase agreements. Technically, the stock is building a clear structural base above its short-term exponential moving averages. [SolarQuarter](#)

### INDIAN ENERGY EXCHANGE LTD. (CMP: 117, MARKET CAP: 10428 Cr., SECTOR: POWER GENERATION/DISTRIBUTION)

The power exchange platform recorded steep structural selling pressure, falling 4.29% on the BSE and 4.30% on the NSE to close at ₹117.20. Market sentiment turned nervous on reports of tighter short-term regulatory oversight regarding spot electricity price caps on merchant power transactions. Volumetric clearing dropped 3.5% sequentially, though automated cross-border power transmission trades expanded at a steady clip. The stock has drifted below its short-term 20-day moving average, creating technical resistance near the ₹124 zone. [SolarQuarter](#)

### INOX WIND LTD. (CMP: 83, MARKET CAP: 14298 Cr., SECTOR: ELECTRIC EQUIPMENT)

The wind energy equipment manufacturer came under intense selling pressure, declining 3.72% to close at ₹82.98 on the BSE. Despite a robust order pipeline exceeding 2.8 GW, execution anxiety across non-sunny states impacted short-term revenue realization projections. Financial leverage remains a key monitoring factor for institutional desks, although recent debt-reduction tranches have eased structural balance sheet stress. The counter displays an oversold setup on momentum oscillators, with historical consolidation support established at ₹80. [SolarQuarter](#)

## Sectoral Inde

Sectoral Inde	CMP	1D	YTD	P/E x
Nifty Auto	26,733	-2.2%	-5.2%	22.0
Nifty IT	27,555	-1.4%	-27.3%	21.5
Nifty Fin Ser	26,324	-2.5%	-4.7%	17.2
Nifty Pharma	25,430	-1.0%	11.9%	41.8
Nifty Services	30,679	-2.1%	-8.9%	33.8
Nifty Cons Du	37,210	-1.3%	1.2%	50.4
Nifty PSE	9,804	-1.5%	-0.5%	10.3
Nifty FMCG	48,977	-2.5%	-11.7%	33.7
Nifty Pvt Bank	27,592	-2.5%	-3.9%	10.3
Nifty PSU Banl	8,072	-2.7%	-5.4%	13.2
Nifty Cons	11,629	-2.1%	-5.4%	41.1
Nifty Realty	876	-1.9%	-0.2%	38.1
Nifty Infra	9,250	-2.2%	-3.8%	21.5
Nifty Energy	38,696	-1.3%	9.5%	12.3
Nifty Health	16,146	-1.2%	10.3%	38.6
Nifty India Mfg	15,750	-1.6%	2.2%	29.3
Nifty Metal	12,469	-0.9%	11.7%	22.3
Nifty Oil & Gas	10,999	-2.2%	-10.1%	16.8

## Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
<b>Long</b>		
BDL	10.0	0.1
UNOMINDA	8.6	1.3
SRF	8.1	1.4
RADICO	7.3	5.2
LODHA	5.8	2.6
<b>Short</b>		
POLICYBZR	13.1	-0.9
ADANIPOWER	9.1	-0.6
COCHINSHIP	7.9	-2.7
ASTRAL	5.9	-0.1
ICICIPRULI	5.5	-0.3
<b>Long Unwinding</b>		
BAJAJFINSV	-2.0	-1.5
AUROPHARMA	-1.6	-1.7
OFSS	-1.6	-1.4
MAXHEALTH	-1.2	-1.8
TECHM	-0.9	-0.9
<b>Short Covering</b>		
360ONE	-7.3	1.9
BAJAJ-AUTO	-6.9	2.9
ETERNAL	-6.1	6.7
HDFCAMC	-4.9	2.4

**LARSEN & TOUBRO LTD. (CMP: 3896, MARKET CAP: 535922 Cr., SECTOR: ENGINEERING - CONSTRUCTION)**

The infrastructure conglomerate fell 2.29% to settle at ₹3,900.00 as rising geopolitical concerns prompted broad-based institutional equity liquidation. However, its core order book remains highly resilient at ₹4.6 lakh crore, ensuring excellent execution visibility over the next eleven quarters. Operating margins for the engineering segment are guided stable at 8.5-9.0% despite transient spikes in international logistics and maritime container freight rates. Technical indicators show the stock retesting its multi-month consolidation baseline near the ₹3,850 psychological level. [SolarQuarter](#)

Commodity:	CMP	1D	YTD
Gold (\$)	4,079	-1.9%	0.3%
Silver (\$)	58.8	-4.1%	0.1%
Brent Oil (\$)	78.1	5.3%	-0.2%
WTI Oil (\$)	73.9	4.9%	-20.6%

Currency	CMP	1D	YTD
USD/INR	95.6	0.6%	0.0%
EUR/INR	109.0	0.6%	0.1%
GBP/INR	127.7	0.8%	0.1%
JPY/INR	0.6	0.4%	0.1%
EUR/USD	1.1	0.0%	0.1%

**Securities Lending & Borrowing Scheme (SLBS)**

Company	Under.Ltp	Fut.Ltp	Spread (%)
COCHINSHIP	1508.5	1470.1	2.55
ASTRAL	1388.6	1363.4	1.81
KFINTECH	882	869.2	1.45
BDL	1,408.40	1,389.00	1.38
HERMOTOCC	4,942.00	4,878.00	1.3

## 52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
ADANIENSOL	1,660	1,712	1,664	7-Jul-26
LUPIN	2,470	2,527	2,517	7-Jul-26
ATHERENERG	1,204	1,214	1,176	1-Jul-26
GLAND	2,500	2,574	2,563	7-Jul-26
JBCHEPHARM	2,435	2,468	2,429	7-Jul-26

## 52 Week Low

Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
IRFC	88	87	87	30-Mar-26
FIRSTCRY	208	206	207	19-Feb-26
CELLO	359	357	364	2-Jul-26
BSOFT	272	271	275	1-Jul-26
JYOTHYLAB	190	188	188	1-Jul-26

## Volume Shockers

Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
BAYERCROP	5,550	27	37	4,169
GEMAROMA	17,154	133	150	208
MASTERTR	22,600	189	208	81
INDIANCARD	107	1	2	245
BANARBEADS	99	1	1	122
DPABHUSHAN	782	11	21	1,090
ORCHPHARMA	3,260	52	76	1,005
DHUNINV	30	1	0	965
SGMART	8,207	191	148	672
BANK10ADD	1,721	43	51	17
HIKAL	10,190	262	333	228
SBIETFPB	272	9	19	282
SBIBPB	2,104	76	72	46
NDGL	5	0	0	2,821
HDFCPSUBK	8,486	317	328	82
ELDEHSG	7	0	1	810
UNICHEMLAB	3,535	141	136	573
GSEC10IETF	10	0	12	266
MADHAV	55	2	4	37
BANKPSU	702	40	32	82
RADHIKAJWE	3,514	199	186	56
KREBSBIO	82	5	6	54
MONEXT50	120	7	96	71
ELITECON	17,023	1,100	1,085	24

## Bulk Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price (in 000)
AARTECH	Krishna Awtar Kabra	BUY	287	51.5
AARTECH	Krishna Awtar Kabra	SELL	287	50.1
ACCORD	Neo Apex Share Broking Services Llp	BUY	78	191.0
ACCORD	Rv Fintech	SELL	22	191.0
AGIIL	Arihant Capital Markets Limited	SELL	644	349.6
ATALREAL	Altizen Ventures Llp	SELL	1184	28.2
ATALREAL	Altizen Ventures Llp	BUY	1839	28.5
ATALREAL	Garg Atul	SELL	1852	28.7
ATALREAL	Hrti Private Limited	SELL	535	28.5
ATALREAL	Hrti Private Limited	BUY	1014	28.7
ATALREAL	Manish N Thakur	SELL	1450	28.8
ATALREAL	Qe Securities Llp	SELL	908	28.4
ATALREAL	Qe Securities Llp	BUY	936	28.6
BANG	Sandeep Jain	SELL	70	28.6
BAYERCROP	Bayer Ag	BUY	5354	4,122.3
BAYERCROP	Bayer Cropscience Aktiengesellschaft	SELL	5354	4,122.3
BMLL	Rathod Manoj Chhaganlal Huf	SELL	2	124.0
BMLL	Rathod Manoj Chhaganlal Huf	BUY	210	122.4
CGCL	Smallcap World Fund Inc	BUY	5132	240.2
CKKRETAIL	Jagid Vanitaben Rajendraprasad	BUY	40	138.0
CKKRETAIL	Jagid Vanitaben Rajendraprasad	SELL	111	136.8
CKKRETAIL	Rathod Digvijaysinh Rajendrasinh	SELL	110	137.2
CKKRETAIL	Vaxfab Enterprises Limited	BUY	182	136.9
DBSTOCKBRO	Chaubara Eats Private Limited	BUY	250	48.0
DIGIKORE	Megha Agrawal	SELL	69	48.2
GCSL	Mansukh Securities & Finance Limited	SELL	146	474.4
GCSL	Mansukh Securities & Finance Limited	BUY	178	478.6
GEMAROMA	Grt Strategic Ventures Llp	SELL	406	217.4
GEMAROMA	Grt Strategic Ventures Llp	BUY	406	217.3
GEMAROMA	Junomoneta Finsol Private Limited	SELL	314	217.4
GEMAROMA	Junomoneta Finsol Private Limited	BUY	321	217.3
GEMAROMA	Microcurves Trading Private Limited	BUY	513	221.1
GEMAROMA	Microcurves Trading Private Limited	SELL	513	221.2
GEMAROMA	Musigma Securities	BUY	269	221.2
GEMAROMA	Musigma Securities	SELL	269	221.3
GEMAROMA	Nk Securities Research Private Limited	SELL	805	217.9
GEMAROMA	Nk Securities Research Private Limited	BUY	805	217.7
GEMAROMA	Qe Securities Llp	SELL	503	217.5
GEMAROMA	Qe Securities Llp	BUY	513	213.4
GEMAROMA	Silverleaf Capital Services Private Limited	BUY	348	217.2
GEMAROMA	Silverleaf Capital Services Private Limited	SELL	348	216.9
GEMAROMA	Vinsul Makardi Ltd	SELL	329	216.9
GEMAROMA	Vinsul Makardi Ltd	BUY	329	216.5
IOLCP	Hrti Private Limited	BUY	1148	168.7

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price
IOLCP	Hrti Private Limited	SELL	2162	169.6
IOLCP	Microcurves Trading Private Limited	SELL	1574	171.0
IOLCP	Microcurves Trading Private Limited	BUY	1574	171.0
IOLCP	Qe Securities Llp	SELL	1515	170.5
IOLCP	Qe Securities Llp	BUY	1550	168.8
ITDC	Blitzquant Research Llp	BUY	486	751.1
ITDC	Blitzquant Research Llp	SELL	486	751.4
ITDC	Dipan Mehta Commodities Private Limited	SELL	537	739.7
ITDC	Dipan Mehta Commodities Private Limited	BUY	544	734.2
ITDC	Elixir Wealth Management Private Limited	SELL	445	742.8
ITDC	Elixir Wealth Management Private Limited	BUY	452	739.4
ITDC	Grt Strategic Ventures Llp	SELL	674	747.8
ITDC	Grt Strategic Ventures Llp	BUY	674	747.5
ITDC	Irage Broking Services Llp	SELL	853	742.3
ITDC	Irage Broking Services Llp	BUY	936	747.2
ITDC	Jump Trading Financial India Private Limited	SELL	753	750.1
ITDC	Jump Trading Financial India Private Limited	BUY	753	748.9
ITDC	Junomoneta Finsol Private Limited	SELL	592	744.1
ITDC	Junomoneta Finsol Private Limited	BUY	601	743.7
ITDC	Microcurves Trading Private Limited	SELL	2053	745.8
ITDC	Microcurves Trading Private Limited	BUY	2053	745.4
ITDC	Musigma Securities	SELL	513	745.0
ITDC	Musigma Securities	BUY	513	744.4
ITDC	Nk Securities Research Private Limited	SELL	876	739.0
ITDC	Nk Securities Research Private Limited	BUY	876	738.6
ITDC	Qe Securities Llp	BUY	997	742.7
ITDC	Qe Securities Llp	SELL	999	735.2
IWARE	Getfive Opportunity Fund-I	BUY	99	365.3
IWARE	Inter India Roadways Private Limited	SELL	704	354.0
IWARE	Kedia Securities Private Limited	BUY	268	348.9
IWARE	Kedia Securities Private Ltd	BUY	233	348.3
JINDRILL	Cit Research Tech Private Ltd	BUY	152	605.7
JINDRILL	Cit Research Tech Private Ltd	SELL	152	606.0
JINDRILL	Dipan Mehta Commodities Private Limited	SELL	176	610.6
JINDRILL	Dipan Mehta Commodities Private Limited	BUY	182	611.3
JINDRILL	Elixir Wealth Management Private Limited	SELL	306	610.9
JINDRILL	Elixir Wealth Management Private Limited	BUY	312	610.8
JINDRILL	Grt Strategic Ventures Llp	BUY	537	607.1
JINDRILL	Grt Strategic Ventures Llp	SELL	537	607.4
JINDRILL	Hrti Private Limited	BUY	292	605.1
JINDRILL	Hrti Private Limited	SELL	297	605.7
JINDRILL	Irage Broking Services Llp	SELL	459	606.2
JINDRILL	Irage Broking Services Llp	BUY	499	605.5
JINDRILL	Jump Trading Financial India Private Limited	SELL	231	606.4
JINDRILL	Jump Trading Financial India Private Limited	BUY	231	606.6
JINDRILL	Junomoneta Finsol Private Limited	SELL	478	605.9
JINDRILL	Junomoneta Finsol Private Limited	BUY	493	605.6

JINDRILL	Microcurves Trading Private Limited	SELL	1484	606.8
JINDRILL	Microcurves Trading Private Limited	BUY	1484	606.6
JINDRILL	Nk Securities Research Private Limited	SELL	670	607.7
JINDRILL	Nk Securities Research Private Limited	BUY	670	607.4
JINDRILL	Qe Securities Llp	BUY	647	608.9
JINDRILL	Qe Securities Llp	SELL	650	604.2
JINDRILL	Silverleaf Capital Services Private Limited	BUY	170	604.1
JINDRILL	Silverleaf Capital Services Private Limited	SELL	170	603.8
JINDRILL	Vinsul Makardi Ltd	SELL	228	604.9
JINDRILL	Vinsul Makardi Ltd	BUY	228	604.3
KALYANKJIL	Graviton Research Capital Llp	BUY	6138	374.0
KALYANKJIL	Graviton Research Capital Llp	SELL	6138	374.1
KNACK	Bofa Securities Europe Sa	BUY	718	185.9
KNACK	Irage Broking Services Llp	BUY	600	186.0
KNACK	Irage Broking Services Llp	SELL	671	186.6
KNACK	Kamal Kumar Kabra	SELL	425	185.6
KNACK	Kamal Kumar Kabra	BUY	725	186.3
KNACK	Marwadi Chandarana Intermediaries Brokers Private Limit	BUY	835	188.0
KNACK	Marwadi Chandarana Intermediaries Brokers Private Limit	SELL	835	186.7
KNACK	Nk Securities Research Private Limited	SELL	1340	186.5
KNACK	Nk Securities Research Private Limited	BUY	1340	186.4
KNACK	Share India Securities Limited	SELL	733	186.4
KNACK	Share India Securities Limited	BUY	733	187.2
LAMOSAIC	Altizen Ventures Llp	BUY	12	48.7
LAMOSAIC	Altizen Ventures Llp	SELL	200	47.3
LAMOSAIC	Mahesh Mulchand Waghela	BUY	186	47.3
MAGSON	Sera Investments & Finance India Limited	BUY	81	179.4
MASTERTR	Hrti Private Limited	SELL	882	82.4
MASTERTR	Hrti Private Limited	BUY	911	81.4
MASTERTR	Junomoneta Finsol Private Limited	BUY	813	82.4
MASTERTR	Junomoneta Finsol Private Limited	SELL	818	82.5
MASTERTR	Nk Securities Research Private Limited	BUY	895	82.3
MASTERTR	Nk Securities Research Private Limited	SELL	895	82.4
MASTERTR	Securocrop Securities India Private Limited	SELL	575	83.6
MASTERTR	Securocrop Securities India Private Limited	BUY	701	83.1
MASTERTR	Silverleaf Capital Services Private Limited	BUY	794	82.3
MASTERTR	Silverleaf Capital Services Private Limited	SELL	794	82.4
MODIS	Aegis Investment Fund	BUY	100	345.0
MODIS	Al Maha Investment Fund Pcc - Onyx Strategy	BUY	250	345.6
MODIS	F3 Advisors Private Limited	SELL	328	345.0
MOS	Hancshi Tradelinkk Llp .	SELL	1332	13.8
MOS	Sera Investments & Finance India Limited	BUY	1336	13.8
RAMCOSYS	Hrti Private Limited	SELL	310	883.7
RAMCOSYS	Hrti Private Limited	BUY	346	873.0
RAMCOSYS	Junomoneta Finsol Private Limited	BUY	289	883.7
RAMCOSYS	Junomoneta Finsol Private Limited	SELL	290	883.6
RAMCOSYS	Qe Securities Llp	SELL	240	883.5
RAMCOSYS	Qe Securities Llp	BUY	244	873.9
RATNAVEER	Arihant Capital Markets Limited	BUY	1223	184.8
RATNAVEER	Arihant Capital Markets Limited	SELL	1223	184.9
RICHA	Sera Investments & Finance India Limited	BUY	100	95.0

## Block Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price
BAYERCROP	Bayer Cropscience Ltd	BUY	53,54,030	4,122.3
BAYERCROP	Bayer Cropscience Ltd	SELL	53,54,030	4,122.3

## Event Calendar – Corporate Action (Financial Results/ Dividend/other business matters)

Company	Purpose
Asian Hotels (East) Limited	Financial Result
Anand Rathi Wealth Limited	Financial Results
Aqylon Nexus Limited	Fund Raising/Other business matters
Country Condo's Limited	Fund Raising
Eimco Elecon (India) Limited	Financial Result
Expleo Solutions Limited	Dividend
GM Breweries Limited	Financial Result
Premier Explosives Limited	Other business
Supreme Infrastructure India Limited	Financial Result
Tata Consultancy Services Limited	Financial Result
Tijaria Polypipes Limited	Other business

**Nifty & Bank Spot – Pivot Levels 09/07/2026**

	Closing	Support			Resistance		
		1	2	3	1	2	3
<b>Nifty</b>	<b>23882</b>	<b>23691</b>	<b>23500</b>	<b>23196</b>	<b>24186</b>	<b>24490</b>	<b>24681</b>
<b>Bank Nifty</b>	<b>58291.50</b>	<b>56172</b>	<b>55602</b>	<b>54651</b>	<b>57693</b>	<b>58644</b>	<b>59214</b>

Global Macro Events (7th July 2026)			
Event	Previous	Forecasted	
<b>India</b>			
<b>USA</b>			
Consumer Credit Change MAY	\$20.73B	\$19.0B	
Initial Jobless Claims JUL/04	215K	220.0K	
Continuing Jobless Claims JUN/27	1814K	1818.0K	
Jobless Claims 4-week Average JUL/04	222K	220.0K	
Fed Williams Speech			
NY Fed Bill Purchases 1 to 4 months			
Existing Home Sales JUN	4.17M	4.2M	
Existing Home Sales MoM JUN	0.032	0.007	
EIA Natural Gas Stocks Change JUL/03	87Bcf		
4-Week Bill Auction	0.03605		
8-Week Bill Auction	0.0365		
15-Year Mortgage Rate JUL/09	0.0579		
30-Year Mortgage Rate JUL/09	0.0643		
30-Year Bond Auction	0.0502		
Fed Logan Speech			
<b>China</b>			
Inflation Rate YoY JUN	0.012	0.013	
Inflation Rate MoM JUN	-0.001	0	
PPI YoY JUN	0.039	0.035	
<b>Great Britain</b>			
RICS House Price Balance JUN	-0.34	-0.22	
<b>Germany</b>			
Balance of Trade MAY	€14.5B	€16.0B	
Exports MoM MAY	0.90%		
Imports MoM MAY	1.20%		

## #STOCK SPECIFIC NEWS

**Exide Industries** The stock stood out as a strong performer against broader market weakness, gaining 1.21% on the BSE to close at ₹419.40 and 1.59% on the NSE to end at ₹421.10. Institutional buying accelerated following a positive operations update regarding their upcoming lithium-ion cell manufacturing facility expansion in Bengaluru. Revenue guidance for the electric mobility division has been upscaled by 12% for the second half of the financial year. The stock charts reflect an intermediate bullish continuation pattern with immediate support holding at ₹410. [SolarQuarter](#)

**NTPC Green Energy Ltd.** The recently listed renewable player remained resilient in positive territory, registering modest gains of 0.11% on the BSE and 0.14% on the NSE to close at ₹92.80. The company added 500 MW of operational solar capacities across western grids, increasing its total green generation asset pipeline to 4.2 GW. Operating EBITDA margins are projected to stabilize at 82% over the next two fiscal years due to long-term power purchase agreements. Technically, the stock is building a clear structural base above its short-term exponential moving averages. [SolarQuarter](#)

**Websol Energy System** The clean energy company witnessed heavy profit booking, dropping 4.38% on the BSE to ₹97.25 and 4.20% on the NSE to ₹97.40 amid a broader industry-wide correction. High raw material inventory financing costs pressured short-term working capital cycles, overshadowing their domestic solar cell capacity ramp-up. Quarterly order book execution targets have been elongated into Q2FY27 on localized shipment delays. The counter is currently testing its intermediate support boundary near the ₹95 horizontal pivot. [SolarQuarter](#)

**Indian Energy Exchange** The power exchange platform recorded steep structural selling pressure, falling 4.29% on the BSE and 4.30% on the NSE to close at ₹117.20. Market sentiment turned nervous on reports of tighter short-term regulatory oversight regarding spot electricity price caps on merchant power transactions. Volumetric clearing dropped 3.5% sequentially, though automated cross-border power transmission trades expanded at a steady clip. The stock has drifted below its short-term 20-day moving average, creating technical resistance near the ₹124 zone. [SolarQuarter](#)

**Inox Wind** The wind energy equipment manufacturer came under intense selling pressure, declining 3.72% to close at ₹82.98 on the BSE. Despite a robust order pipeline exceeding 2.8 GW, execution anxiety across non-sunny states impacted short-term revenue realization projections. Financial leverage remains a key monitoring factor for institutional desks, although recent debt-reduction tranches have eased structural balance sheet stress. The counter displays an oversold setup on momentum oscillators, with historical consolidation support established at ₹80. [SolarQuarter](#)

**Larsen & Toubro** The infrastructure conglomerate fell 2.29% to settle at ₹3,900.00 as rising geopolitical concerns prompted broad-based institutional equity liquidation. However, its core order book remains highly resilient at ₹4.6 lakh crore, ensuring excellent execution visibility over the next eleven quarters. Operating margins for the engineering segment are guided stable at 8.5-9.0% despite transient spikes in international logistics and maritime container freight rates. Technical indicators show the stock retesting its multi-month consolidation baseline near the ₹3,850 psychological level. [SolarQuarter](#)

**Reliance Industries** The index heavyweight declined 2.44% to close at ₹1,274.75, tracking a global energy market realignment and high oil price volatility. Gross refining margins face short-term compression due to volatile Brent price bands, though its retail and telecom verticals continue to exhibit steady cash flows. Institutional desks maintain a long-term positive outlook on the counter, pricing in an 11% EBITDA growth over the upcoming quarters. The stock is approaching a massive accumulation cluster situated between the ₹1,250 and ₹1,265 support horizons. [SolarQuarter](#)

**Tata Power** The integrated utility enterprise slipped 1.25% to close at ₹372.50, mirroring the structural downturn across the wider utility and green infrastructure indices. Consolidated generation capacity stood stable, while its rooftop solar deployment business grew by 18% YoY to reach a peak installation run-rate. Balance sheet metrics remain healthy with a net debt-to-equity ratio of 1.1x, providing comfortable headroom for pump-storage project development. From a technical chart perspective, immediate pivot supports are identified around the ₹365 zone. [SolarQuarter](#)

**JSW Energy** The private power producer eased 0.77% to close at ₹539.60, demonstrating relatively higher relative strength compared to other peer power counters. Commercial operations at its newly commissioned hydro projects are tracking ahead of schedule, insulating long-term revenue streams against thermal fuel volatility. Merchant capacity realizations averaged ₹5.10 per unit, helping the firm preserve healthy return profiles for the quarter. The stock maintains its structural placement above the 200-day simple moving average with key support at ₹520. [SolarQuarter](#)

**Vedanta Oil & Gas** The hydrocarbon enterprise rallied significantly, jumping as much as 6.57% during the day to touch ₹38.25 on the back of soaring crude oil futures. Domestic production volumes rose 4.5% sequentially, allowing the firm to maximize realizations from high domestic petroleum pricing benchmarks. Capital expenditure toward deep-water exploration blocks remains on track, supporting resource addition expectations for late FY27. The stock experienced a high-volume breakout, with immediate technical resistance shifting higher toward the ₹42 mark. [Upstox](#)

**Vedanta Aluminium Metal** The base metals division registered strong institutional buying, with shares gaining 4.57% to trade at ₹465.50 apiece on the national exchange. Global aluminum prices gained 4% following international supply disruptions, structurally enhancing the company's spot export margin profiles. Local alumina sourcing from its Lanjigarh expansion has reduced aggregate processing costs by \$80 per ton, boosting immediate operational cash generation metrics. The equity displays a bullish chart structure with a clear target set toward its recent 52-week high. [Upstox](#)

**Vedanta Power** The electricity generation subsidiary was trading 2.22% higher at ₹42.75, benefiting from structural plant load factor enhancements across its commercial units. Long-term coal linkage agreements protected the company from the high spot fuel costs currently impacting merchant power competitors. Quarterly electricity off-take numbers expanded 6% YoY, matching rising industrial demand across core manufacturing belts. Technically, the stock is breakout-ready, tracking a clear ascending channel with support at ₹40. [Upstox](#)

**InterGlobe Aviation** The operator of IndiGo airlines crashed 5.02% as a sharp 6.18% surge in international Brent crude prices to \$78.74 per barrel rattled aviation sector profit expectations. Fuel costs account for approximately 40% of the carrier's operating expenses, threatening to dent next-quarter EBITDAR margins by 180 basis points. Despite robust passenger load factors maintaining an average of 88%, near-term ticket yield pricing may face pressure if consumer demand softens. The stock broke down past its short-term exponential supports, finding next major base support at ₹3,950. [Upstox](#)

**Jio Financial Services** The newly listed non-banking financial player tumbled 5.18%, leading the losses across mid-cap financial indices amidst large-scale institutional risk-off liquidations. Asset management joint venture progress remains functionally sound, though commercial loan book expansion may face macro headwinds if domestic liquidity constraints intensify. Brokerage houses maintain a neutral near-term outlook on the counter pending clear directional guidance on core operational ROA profiles. The stock chart reveals a sharp correction, resting near its primary collection zone at ₹315. [Upstox](#)

**Shriram Finance** The leading asset financing retail non-banking financial company lost 4.91% due to general financial sector derating and escalating wholesale credit anxieties. Commercial vehicle loan

disbursements slowed down by 2.5% sequentially, reflecting temporary cooling in the domestic infrastructure transportation sector. Gross stage-3 non-performing assets remained tightly controlled at 5.3%, though net interest margins compressed slightly by 15 basis points. The counter shows high technical resistance at ₹2,550, with intermediate pivot support active at ₹2,320. [Upstox](#)

**Maruti Suzuki India** The leading automobile manufacturer corrected sharply by 4.04%, dragged down by anxieties over escalating input material costs and broader index liquidations. Dealership inventory adjustments slowed down wholesale factory shipments for the short term, putting pressure on high-margin utility vehicle distribution timelines. Profit margins are projected to experience a minor squeeze if global logistical friction pushes steel and rubber commodity baskets higher. The stock faces short-term downward technical momentum, looking to test historical support at ₹11,800. [Upstox](#)

**Hindustan Unilever** The fast-moving consumer goods giant declined 3.30% as cautious pre-earnings sentiment and slow rural volume growth expectations weighed heavily on valuation multiples. Raw material inflation across palm oil and crude derivatives portfolios is expected to restrict gross margin expansions over the coming two quarters. Market analysts note that premium urban portfolios remain steady, but value segments require extensive promotional support to defend domestic market share. The stock has broken below its 50-day moving average, creating a near-term ceiling at ₹2,480. [Upstox](#)

**Oil and Natural Gas Corporation** Bucking the downward market trend, the state-run upstream exploration major gained 1.15% as global benchmark oil futures surged past a two-week high. Realized gas prices remained pinned at the upper statutory cap, while unhedged oil production volumes captured the full upside of the \$78 Brent crude spike. Higher cash generation will comfortably cover its ongoing capital deployment programs in deepwater offshore blocks without raising leverage. The stock exhibits a classical defensive breakout structure, with structural pivot support firming up at ₹265. [Upstox](#)

**Bajaj Auto** The two-and-three-wheeler manufacturing specialist closed 0.54% higher, displaying defensive premium characteristics amid broad index corrections. Robust export volume recoveries in African and Latin American markets neutralized localized domestic deceleration trends across entry-level commuter variants. Premium electric vehicle portfolio expansion is tracking well, with retail market share hitting a new peak of 11.5% in major urban zones. Technically, the counter remains resilient, outperforming the benchmark index and holding strong support at ₹9,450. [Upstox](#)

## SECTION 2: CORPORATE ANNOUNCEMENTS

**Crompton Greaves Consumer Electricals Limited / Award Receipt Disclosure** The company announced the receipt of an additional allocation under a Letter of Empanelment and Rate Contract from Maharashtra State Electricity Distribution Company Limited (MSEDCL). The scope involves design, manufacture, and supply operations compliant with SEBI Regulation 30 mandates, augmenting its domestic order book. [Official Filing](#)

**Afcons Infrastructure Limited / Annual Report Submission** The enterprise officially submitted its detailed Annual Report for the Financial Year 2025-26 to the stock exchanges under statutory compliance timelines. The filing highlights core contract management procedures, international port engineering execution capabilities, and updated risk mitigation frameworks governing multi-country operations. [Official Filing](#)

**Godrej Properties Limited / General Meeting Intimation** The real estate developer issued an official broadcast disclosure regarding its upcoming scheduled Shareholders Meeting to vote on critical corporate resolutions. The notice outlines planned capital structures, land acquisition monetization programs, and strategic growth avenues intended to scale residential project pipelines. [Official Filing](#)

**Sula Vineyards Limited / General Operations Update** The company uploaded an official corporate disclosure to the national stock exchange highlighting its forward production capabilities and brand premiumization guidelines. The regulatory update outlines distribution framework expansion plans across northern states and strategic investments into wine-tourism properties to boost non-liquor revenue streams. [Official Filing](#)

**Goldiam International Limited / SEBI Compliance Certification** The gems and jewelry exporter filed its mandatory compliance certificate under the SEBI (Depositories and Participants) Regulations framework. The corporate disclosure verifies orderly depository reconciliation processes for the preceding quarter, indicating stable internal administrative governance parameters. [Official Filing](#)

**RSWM Limited / Corporate Operational Updates** The textile manufacturing entity submitted an official market update via exchange filings detailing its updated spinning facility configurations. The document presents structural adjustments made to mitigate volatile synthetic fiber input costs and optimize manufacturing asset utilization rates under prevailing trade conditions. [Official Filing](#)

**Premier Energies Limited / Postal Ballot Scrutinizer Report** The renewable energy company submitted a copy of its official Scrutinizer Report detailing voting results for corporate resolutions put forth via postal ballot. The document confirms that shareholders approved all planned capital allocation expansions and green capacity build-out plans with an overwhelming institutional majority. [Official Filing](#)

### SECTION 3: MACRO / NON-STOCK NEWS

**Geopolitical Stress Indicators / Strait of Hormuz Crisis** Global financial markets entered a volatile phase after international announcements indicated that the interim Middle East peace framework has dissolved following maritime skirmishes. Investors immediately triggered a structural pivot into risk-off asset allocations, severely impacting major emerging market equity indexes. The resulting energy supply anxieties sparked an intense wave of capital liquidation across domestic consumer and technology portfolios on macro inflation fears. Broad market implied volatility gauges spiked 14.5% as systematic desks rehedge long-duration positions. [The Hindu](#)

**Crude Oil Futures / Multi-Commodity Exchange Surge** Domestic crude oil futures contracts soared to a two-week peak of ₹6,932 per barrel, registering an immediate advance of 3.39% in heavy trading volume. The rally was fueled by intensifying West Asian cross-border conflicts threatening vital maritime oil transit chokepoints. Energy specialists forecast near-term pressure on downstream processing margins if local oil procurement benchmarks stay structurally elevated for an extended period. This upward trend directly impacts domestic oil marketing companies, limiting their short-term fuel retail pricing flexibility. [HDFC Sky](#)

**International Energy Benchmarks / Brent Crude Realignment** Global energy benchmark Brent crude jumped by 6.18% to settle at \$78.74 per barrel as geopolitical frictions created supply risk premiums. The rapid advance disrupted earlier multi-month macro projections that pointed toward stabilizing international energy baskets below the \$72 threshold. Fixed-income asset managers are reassessing global corporate trade flows, expecting a delayed unwinding of monetary tightening regimes across major developed markets. This upward pressure introduces fresh headwinds for net energy-importing economies like India, complicating central bank inflation management paths. [The Hindu](#)

**Equity Market Aggregates / Sensex Correction Metrics** The S&P BSE Sensex index experienced a sharp structural contraction, tanking 1,677.12 points or 2.15% to finish the session at 76,503.60 points. Intraday trading tracking data revealed a volatile drop of up to 2.45%, erasing nearly ₹9 lakh crore of domestic equity investor wealth in a single day. The sudden multi-sector liquidation was driven by global algorithmic selling rules as international portfolios reduced overall emerging market assets.

Technical analysts note that the index has breached its near-term support lines, turning focus toward structural support targets. [Upstox](#)

**NSE Benchmark Performance / Nifty 50 Liquidation Wave** The 50-share NSE Nifty index tumbled by 516.65 points or 2.12% to close the day at 23,882.05 points, slipping decisively below its psychological 24,000 threshold. Every single component within the core index pack finished the session in the red, illustrating the highly synchronized nature of the institutional de-risking phase. Heavyweight automobile and consumer discretionary counters led the structural decline on fears of immediate raw material price transmission. Derivatives positioning highlights an accumulation of short open interest across near-month index future contracts. [The Hindu](#)

**Asian Market Corridors / Regional Index Synchronicity** Equity indices across the Asia-Pacific territory recorded deep losses, led by a massive 5.35% plunge in South Korea's Kospi index. Japan's Nikkei 225 index declined 2.11%, while the Shanghai Composite index managed a milder dip of 0.49% due to localized state liquidity support. This widespread regional market correction underlines the vulnerability of manufacturing hubs to unexpected spikes in global energy distribution networks. Capital flows across Asian desks indicate temporary reallocations into defensive gold and sovereign treasury instruments. [The Hindu](#)

**European Equity Markets / Global Capital Realignment** Major European stock benchmarks opened significantly lower, tracking negative sentiment from volatile late-night trading sessions on Wall Street. Industrial manufacturing and transportation indices across Frankfurt and Paris registered the largest drops, reflecting immediate corporate vulnerabilities to rising supply chain transport costs. Institutional fund managers are increasing cash allocations, reducing exposures to cyclical engineering stocks in favor of defensive government securities. This international capital flight restricts global equity liquidity pools, increasing short-term capital costs for emerging corporates. [The Hindu](#)

**Domestic Asset Valuation / BSE Market Capitalization Contraction** The total market valuation of all companies listed on the Bombay Stock Exchange dropped to approximately ₹471 lakh crore from the previous session's base of ₹480 lakh crore. This rapid contraction represents one of the sharpest single-day capital erosions in recent quarters, cutting across both large-cap and mid-cap spaces. Retail margin calls across leveraged derivatives segments added to the late-afternoon selling momentum as stop-losses were sequentially triggered. Investment strategists recommend focusing on asset-light companies with net cash balance sheets to weather this valuation correction. [Upstox](#)

**Banking System Liquidity / Call Money Variance** The Reserve Bank of India reported that banking system secondary liquidity moved into a temporary deficit of ₹35,000 crore due to localized advance tax matching cycles. The credit crunch caused the weighted average call money rate to trade sticky at 6.58%, prompting active interventions via overnight variable rate repo operations. Money market desks expect short-term commercial paper yields to edge up by 10 basis points if the central bank sustains its tight liquidity stance. This monetary positioning aims to keep domestic core inflation expectations well-anchored against imported raw material price pressures. [RBI](#)

**Foreign Portfolio Flows / Institutional Allocation Drift** Exchange data indicated that while Foreign Portfolio Investors maintained a small net buying figure of ₹393.19 crore in earlier sessions, their stance turned protective as geopolitical headlines changed. Algorithmic macro funds initiated large blocks of index futures selling to hedge active cash equity portfolios against a volatile rupee. Currency specialists anticipate that the domestic currency will face transient depreciation pressures if global safe-haven flows push the dollar index past recent resistances. This trend requires proactive forex reserve utilization by the central bank to maintain balanced trade terms. [The Hindu](#)

**Fixed Income Benchmarks / Sovereign Bond Yield Realignment** The Indian 10-year benchmark government bond yield hardened by 4 basis points to trade at 7.02% as international energy spikes complicated near-term rate cut timelines. Debt market participants scaled back expectations for an early Q3 monetary policy easing cycle, pricing in a longer pause from the central bank. Long-term corporate bond issuances also experienced a minor pricing repricing, with AAA credit spreads expanding slightly across state utilities. This yield firming restricts immediate capital gains for long-duration fixed-income fund portfolios. [Business Standard](#)

**Manufacturing Output Metrics / Purchasing Managers Index Baseline** The adjusted Manufacturing PMI printed a strong reading of 58.2, confirming that underlying domestic industrial factory activity remains fundamentally separated from short-term financial index swings. New export orders for engineered goods and electronics sustained expansion tracks, though input cost metrics began showing the early effects of higher shipping expenses. Corporate capital expenditure plans for the current fiscal year remain unchanged among major manufacturing enterprises, supported by high capacity utilization levels. Economists suggest that this underlying structural strength will prevent deep downside risks to real GDP estimates. [Business Standard](#)

**Services Sector Momentum / Composite Macro Balance** India's services sector activity index registered a resilient print of 59.8, driven by robust domestic software delivery, financial consultancy operations, and digital enterprise migrations. The continuous expansion in services employment continues to support urban wage growth trends, cushioning domestic consumer discretionary demand patterns. International service export revenues remain a reliable buffer, strengthening the country's overall invisible trade balance performance. This service-side resilience helps offset temporary manufacturing cost variances, keeping macro stability parameters within acceptable bands. [Financial Express](#)

**Goods and Services Tax Aggregates / Public Spending Capacity** Gross GST collections maintained a strong trajectory, expanding by 11.2% YoY to reach ₹1.84 lakh crore for the evaluated tax tracking period. The buoyant revenue trend reflects stable compliance frameworks and clean electronic transaction mapping across major manufacturing states like Maharashtra and Tamil Nadu. This consistent revenue generation ensures regular state compensation payouts, keeping public infrastructure capital spending allocations fully funded. Analysts emphasize that this fiscal cushion minimizes the need for supplementary market borrowings by the central government. [Economic Times](#)

**Direct Tax Aggregates / Advance Tax Buoyancy** Net direct tax collections for the current fiscal cycle posted a solid 17.8% YoY growth, driven by higher advance tax payments from banking and financial services corporations. This tax collection momentum supports the government's medium-term fiscal consolidation glide path, targeting a deficit reduction below the projected baseline. Fixed-income investors view this revenue strength as a positive metric that reduces the risk of extra sovereign debt supply in the market. This fiscal cushion provides the government with significant flexibility to maintain key infrastructure project timelines. [Economic Times](#)

**Current Account Adjustments / External Stability Parameters** India's current account deficit narrowed down to 0.7% of GDP, supported by stable service remittances and steady software engineering service exports. The structural balance has helped domestic foreign exchange reserves build up to a robust buffer of \$662 billion, offering an extensive defensive shield against external capital market shocks. Forex strategists expect this reserve cushion to keep the rupee relatively stable compared to peer emerging market currencies during periods of global asset reallocation. This currency stability minimizes unhedged external commercial borrowing risks for top-tier Indian companies. [RBI](#)

**Consumer Price Index / Retail Inflation Path** Headline consumer price index inflation prints normalized to 4.30%, remaining well within the central bank's statutory comfort zone of 2.0-6.0%. Core retail inflation, which excludes volatile food and fuel categories, remained low at 3.65%, demonstrating effective aggregate demand management across the domestic marketplace. However, food price metrics require continuous monitoring as spatial monsoon coverage determines the final crop yield mix for the autumn harvest. Fixed-income managers maintain their long-term duration asset weights, expecting inflation to remain under control. [Business Standard](#)

**Corporate Debt Markets / NBFC Capital Sourcing** Primary corporate bond issuances by large Indian non-banking financial companies registered an 18% YoY volume expansion, aggregating past ₹62,000 crore for the quarter. Long-term institutional investors like insurance houses and pension trusts remained active buyers, seeking higher yields over sovereign debt instruments. Average credit spreads for premium AA-rated financial institutions remained stable, pointing to healthy balance sheet parameters across the non-banking finance space. This diversified debt market access minimizes corporate dependence on traditional bank lending channels. [Bloomberg](#)

**Agricultural Spatial Realities / Kharif Sowing Density** The India Meteorological Department noted that cumulative seasonal monsoon precipitation across agricultural belts holds at 3.5% above the long-period average. Sowing density for key oilseed and pulse crops expanded by 7.8% YoY, helping lower structural concerns regarding domestic food supply chains. This favorable rain distribution supports positive rural consumption expectations, which is visible in rising entry-level tractor and commercial rural transport financing trends. Consumer stable enterprises expect this rural recovery to gradually drive low-tier volume growth over the upcoming quarters. [Mint](#)

**Automobile Retail Registrations / VAHAN Portal Metrics** Total vehicular retail registrations across the automated VAHAN tracking network posted a stable 6.8% YoY expansion, supported by premium passenger utility vehicles. Electric vehicle adoption in the urban two-wheeler market climbed to 8.0%, helped by localized charging infrastructure rollouts and component manufacturing scaling. Medium and heavy commercial vehicle registrations saw flat growth, reflecting an expected pause after extensive logistics fleet expansions over the past two years. Dealership associations expect festive season inventory building to accelerate over the next forty days. [Business Standard](#)

**Aviation Transport Volumes / Operational Density** Domestic aviation passenger traffic expanded by 8.8% YoY, with Indian commercial carriers handling a record monthly volume of 13.9 million flyers. Fleet utilization metrics remained high at an average of 87.5%, helping operators balance part of the impact from elevated aviation turbine fuel prices. New airport openings under regional connectivity programs continue to attract fresh entry-level travel demand from tier-2 geographic clusters. Financial analysts note that sustaining high passenger load factors is essential to protect industry profitability amid volatile fuel costs. [Financial Express](#)

**Real Estate Absorption Metrics / Metrological Housing Trends** Residential real estate unit sales across the top seven metropolitan housing markets grew by 13% YoY, driven by premium home bookings. Finished inventory holding timelines shortened to 16 months, encouraging leading organized real estate developers to deploy capital into fresh land acquisition joint ventures. Land asset bidding across satellite city fringes remains active, reflecting positive long-term expectations for transit-oriented infrastructure development. Home finance institutions recorded steady credit growth, with asset quality markers in the mortgage division remaining safe. [Mint](#)

**Mutual Fund Asset Inflows / SIP Mobilization Metrics** The Association of Mutual Funds in India highlighted that systematic investment plan inflows hit a steady monthly run-rate milestone of ₹21,200 crore. Total equity assets managed by domestic fund houses expanded by 16.5% YoY, reflecting a structural shift in household financial savings toward capital markets. This stable domestic institutional capital stream provides a reliable liquidity cushion that absorbs sudden foreign

portfolio equity sales. Asset management operations are expanding focused manufacturing and infrastructure offerings to meet this steady investment demand. [Moneycontrol](#)

**E-Commerce Transaction Volumes / Digital Retail Footprint** Gross merchandise value across primary electronic commerce platforms expanded by 21% YoY, helped by rising order volumes from Tier-3 town consumers. Quick-commerce delivery architectures continued to expand their product selections into consumer appliances and apparel lines, capturing market share from traditional mom-and-pop operations. This digital consumption shift has driven strong warehouse leasing demand across peripheral metropolitan transport junctions. Digital payment networks processed these transaction peaks smoothly, showing robust system architecture scaling. [Economic Times](#)

**Port Throughput Velocities / Logistics Efficiency Metrics** Total cargo handled across primary state-operated maritime ports expanded by 6.1% YoY, supported by containerized engineering goods and finished chemical exports. Average vessel turnaround times shortened to 21.5 hours following automated terminal tracking upgrades and direct port entry logistics clearings. Private port management entities continued to gain volume share, using deep-draft infrastructure to process ultra-large container vessels efficiently. This logistics performance helps lower overall inventory carrying costs for domestic export-oriented industrial units. [Financial Express](#)

**Power Grid Consumption / Peak Demand Baselines** National peak electricity demand touched a fresh high of 240 Gigawatts, driven by summer industrial cooling loads and manufacturing base operations. Renewable energy sources supplied nearly 30.5% of peak grid requirements, demonstrating steady progress in green energy storage and transmission integration. Base electricity pricing across spot exchanges settled near ₹5.35 per unit, avoiding extreme price spikes for heavy manufacturing users. Utilities expect ongoing capital spending in regional distribution grid automation to help lower transmission energy leakages. [Mint](#)

**Textile Export Corridors / Apparel Sourcing Realignment** Ready-made garment exports from primary manufacturing clusters expanded by 8.4% YoY, helped by steady global order shifts toward reliable South Asian destinations. Ongoing trade agreement negotiations with Western economic blocs are moving into final review stages, raising expectations for lower tariff access for domestic apparel units. Spinning factories reported improved capacity utilization rates, supported by stable domestic raw cotton pricing and steady export volume pipelines. Textile equity desks anticipate steady profit margin outcomes for integrated export players over the medium term. [Business Standard](#)

**Telecom Infrastructure Densification / 5G Rollout Status** India's consolidated 5G base station network surpassed 475,000 installations, completing extensive network coverage across all major semi-urban economic zones. Infrastructure management firms recorded a 13.5% YoY improvement in tower tenancy ratios, supporting predictable and recurring rental cash flow generations. Fiber connectivity to mobile towers reached a baseline of 54%, increasing operational data processing speeds and reducing latency issues during high-traffic hours. Industry experts expect private corporate 5G network rollouts to drive the next wave of infrastructure hardware sales. [Bloomberg](#)

**Chemical Industry Trends / Specialization Margin Recovery** Domestic specialty chemical production houses reported a gradual stabilization in operating margins as high-cost raw materials were fully cleared out of supply chains. Destocking cycles across European agrochemical distribution lines have mostly wound down, leading to a gradual return of long-term contract manufacturing orders. Local crop protection segments saw steady initial volume off-take, supported by positive monsoon progress and stable rural credit access. Sector analysts expect specialty chemical profit margins to return to historical averages by the end of the current fiscal period. [Mint](#)

**Engineering Goods Exports / Trade Destination Dynamics** India's engineering product exports expanded by 6.9% YoY, driven by stable demand for industrial tools, electrical systems, and auto parts

from Middle Eastern destinations. Local engineering firms are using global supply chain diversification trends to secure multi-year component supply mandates from international buyers. Good domestic steel availability kept production raw material inputs predictable, allowing for competitive pricing structures in global procurement tenders. Trade bodies predict that total engineering exports will reach an all-time high by the close of the current fiscal year. [Financial Express](#)

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