

Market Commentary

Overnight global action was mixed : On 25th Aug 2025, U.S. markets were negative with S&P 500 up by -27 pts (-0.43%), Dow Jones was up by -349 pts (-0.77%) and Nasdaq was down by -72 pts (-0.31%). India VIX was down by ~0.17%. GIFT Nifty is trading negative at ~24,937 (-56 pts, -0.22%) indicating Indian markets will open negative.

Yesterday, advance decline ratio on NSE was 1,412 : 1,611 and BSE was 1,888 : 2,309, which showed weakness in the overall markets.

Index Options Data Analysis:

Sensex max call OI is at 82,500 and max put OI is at 81,500 with PCR of 0.93

Nifty max call OI and max put OI both are at 25,000 with PCR of 0.78

Bank Nifty max call OI is at 56,000 and max put OI is at 55,000 with PCR of 0.5

Securities in Ban for F&O Trade for 26-AUG-2025:

RBLBANK, TITAGARH

Sectors in Focus:

IT : Nifty IT index was up by +2.37%, **Infosys (+3.08%), TCS (+2.88%)** and **HCL Tech (+2.64%)** were leading the index.

Realty : Nifty realty index was up by +0.75% with **Sobha (+1.97%), Raymond (+1.26%)** and **DLF (+1.23%)** among the top gainers.

Consumer Durables : Nifty consumer durables index was up by +0.57% with **PGEL (+3.18%), Crompton (+2.08%)** and **Amber (+1.39%)** contributing positively to the index.

Metals : Nifty metal index was up by +0.65%, top gainers were **JSL (+2.89%), Hindustan Zinc (+2.59%)** and **Hindalco (+1.79%)**.

FMCG : **Emami Ltd (-4.24%), United Spirits (-1.5%)** and **UBL (-1.29%)** dragged the Nifty metal index by -0.1%

Media : Nifty media was down by -1.67% with **Nazara (-4.24%), Zee Ltd (-2.61%)** and **PVR Inox (-2.18%)** among the laggards.

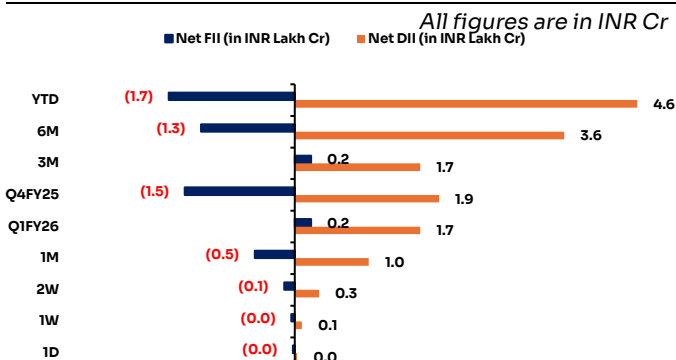
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Fund Flow Activity (25th Aug 2025)

	Buy	Sell	Net
DII	13,371	10,194	3,177
FII/FPI	9,951	12,418	(2,466)



Indian Indices

	CMP	1D (%)	YTD (%)	P/E x
Gift Nifty	24,937	(0.2)	4.9	22.6
BSE Sensex 30	81,636	0.4	4.5	21.3
Nifty 50	24,968	0.4	5.6	22.6
India VIX	12	(0.2)	(19.0)	NA
Nifty Bank	55,139	(0.0)	8.4	16.2
Nifty Next 50	67,711	0.3	(0.4)	67.7
Nifty 500	23,052	0.3	3.0	21.6
NIFTY Mid 100	57,702	0.1	0.9	29.7
Nifty Small 250	17,061	0.1	(3.9)	28.7
USD/INR	87.6	0.0	2.4	
Dollar Index	98.4	0.8	(9.2)	
WTI Crude (\$/bbl)	64.7	(0.1)	(9.2)	
Gold (\$)	3,408	(0.1)	29.1	
India 10Y	6.59%	0.7	(2.5)	
India 2Y	5.83%	(0.5)	(13.0)	
India 1Y	5.61%	(0.5)	(16.0)	
Bank Rate	5.75%	NA	NA	

Global Markets

	CMP	1D (%)	YTD (%)	P/E x
S&P 500	6,439	(0.4)	9.5	27.9
DJIA	45,282	(0.8)	6.4	21.9
Nasdaq	23,426	(0.3)	11.5	38.5
FTSE	9,321	0.1	14.1	14.7
CAC	7,843	(1.6)	6.3	15.0
DAX	24,273	(0.4)	21.9	14.0
Nikkei 225	42,808	0.4	7.3	22.8
Hang Seng	25,830	1.9	28.8	12.5
Shanghai Co	3,884	1.5	15.9	15.0
KOSPI	3,210	1.3	33.8	15.0
S&P/ASX 200	8,972	0.1	10.0	18.0

Stocks in the News

- Oil & Natural Gas Corporation Limited (CMP: 236.65, MCap: 297,712, Sector: Oil & Gas, Valuation: 3.2x FY26 EV/EBITDA)**
 ONGC commenced monetization of the Chinnewala Tibba Gas field in RKOEa, a significant step towards enhancing gas production and revenue streams in the region.
 News Source: [ONGC](#)
- GlaxoSmithKline Pharmaceuticals Limited (CMP: 2799.2, MCap: 47,420, Sector: Pharmaceuticals, Valuation: 34.27x FY26 EV/EBITDA)**
 The company entered the oncology segment with Jemperli and Zejula, introducing precision therapies for gynaecological cancers, marking a significant expansion in its therapeutic portfolio.
 News Source: [GLAXO](#)
- Indian Renewable Energy Development Agency Limited (CMP: 147.75, MCap: 41,506, Sector: Financial Services, Valuation: 4.04x TTM P/BV)**
 The company signed a Performance MoU for FY 2025-26 with the Ministry of New and Renewable Energy, aligning strategic goals to promote renewable energy initiatives. Additionally, it projects a 21% revenue growth in FY26 due to increased green project investments.
 News Source: [IREDA](#)
- NBCC (India) Limited (CMP: 104.15, MCap: 28,120, Sector: Infrastructure, Valuation: 34.48x TTM EV/EBITDA)**
 The company received cabinet approval from the Government of Rajasthan for the development of Rajasthan Mandapam Convention Centre and other urban projects worth approximately ₹3,700 crore, significantly boosting its project pipeline.
 News Source: [NBCC](#)
- Signpost India Limited (CMP: 285.4, MCap: 1,525, Sector: Advertising, Valuation: 40.27x TTM P/E)**
 The company secured a 9-year exclusive contract for Bengaluru Metro advertising with revenue potential up to ₹700 crore, significantly boosting its advertising business prospects.
 News Source: [SIGNPOST](#)

Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
Long		
IDEA	28.2	4.7
DALBHARAT	9.5	0.9
NYKAA	7.8	0.6
LICI	7.7	2.1
HDFCAMC	6.5	0.5
Short		
NUVAMA	12.3	(1.2)
CDSL	9.8	(2.0)
SBICARD	7.3	(0.0)
ANGELONE	7.3	(2.8)
NHPC	6.4	(1.5)
Long Unwinding		
CESC	(21.6)	(1.9)
SJVN	(9.6)	(0.2)
RVNL	(6.8)	(0.7)
BANKINDIA	(4.9)	(0.4)
FORTIS	(3.9)	(2.3)
Short Unwinding		
ABFRL	(33.2)	0.9
JSL	(19.1)	2.5
ATGL	(17.8)	2.4
POONAWALLA	(16.8)	0.3
IRB	(16.6)	2.9

Sectoral Indices

	CMP	1D (%)	YTD (%)	P/E(x)
Nifty Auto	25,423	0.4	11.3	20.9
Nifty IT	36,280	2.4	(16.3)	28.3
Nifty Fin Ser	26,307	(0.0)	11.9	17.2
Nifty Pharma	22,363	0.4	(4.5)	36.8
Nifty Services	32,672	0.4	4.0	35.9
Nifty Cons Dur	39,011	0.6	(6.7)	52.9
Nifty PSE	9,467	(0.1)	(0.7)	9.9
Nifty FMCG	55,682	(0.1)	(2.0)	38.3
Nifty Pvt Bank	26,697	0.0	7.7	10.0
Nifty PSU Bank	6,980	(0.3)	6.7	11.4
Nifty India Cons	12,213	0.1	7.5	43.2
Nifty Realty	916	0.8	(12.9)	39.8
Nifty Infra	9,110	0.1	7.6	21.1
Nifty Energy	34,494	(0.0)	(2.0)	10.9
Nifty Healthcare	14,755	0.1	(1.3)	35.3
Nifty India Mfg	14,552	0.4	5.3	27.1
Nifty Media	1,626	(1.7)	(10.5)	23.2
Nifty Metal	9,437	0.7	9.1	16.9
Nifty Oil & Gas	11,132	0.1	3.6	17.0
Nifty Comm	8,798	0.4	8.3	73.3

6. **The Great Eastern Shipping Company Limited (CMP: 953.5, MCap: 13,612, Sector: Shipping, Valuation: 8.91x FY26 P/E)**

The company has contracted to purchase a Suezmax Crude Carrier of approximately 164,715 dwt, built in 2010, expected to join the fleet by Q3 FY26, enhancing its crude oil transportation capacity.

News Source: [GESHIP](#)

7. **Lemon Tree Hotels Limited (CMP: 168.3, MCap: 13,333, Sector: Hospitality, Valuation: 19.45x FY26 EV/EBITDA)**

The company signed a License Agreement for Keys Select by Lemon Tree Hotels in Mhasrul, Nasik, expanding its presence in the region and strengthening its portfolio of mid-scale hotel properties.

News Source: [LEMONTREE](#)

8. **Protean eGov Technologies Limited (CMP: 818.2, MCap: 3,317, Sector: IT Services, Valuation: 34.84x TTM P/E)**

The company received a work order worth Rs 1,160 crore from UIDAI, enhancing its service portfolio and reflecting growth in its e-governance solutions business.

News Source: [PROTEAN](#)

9. **Gandhar Oil Refinery (India) Limited (CMP: 151.5, MCap: 1,482, Sector: Oil Refinery, Valuation: 19.66x TTM P/E)**

The company received orders from BHEL, bolstering its order book and reinforcing its position in the oil refinery sector with potential revenue growth.

News Source: [GANDHAR](#)

10. **Suraj Estate Developers Limited (CMP: 324.25, MCap: 1,549, Sector: Real Estate, Valuation: 10.39x TTM EV/EBITDA)**

The company announced the acquisition of land at Lower Parel, Mumbai, marking a significant expansion in a prime real estate market that could boost future development projects and revenue potential.

News Source: [SURAJEST](#)

Commodities

	CMP	1D (%)	YTD (%)
Gold (INR/10gm)	100,624	0.2	31.1
Silver (INR/Kg)	115,950	(0.3)	32.8
Brent Crude Oil (\$/bbl)	68.8	1.6	(9.4)
WTI Crude Oil (\$/bbl)	64.7	(0.1)	(9.9)
Natural Gas (INR/MMBTU)	232.9	(1.3)	(23.7)
Copper (INR/Kg)	890.5	1.1	12.3

Currency

	CMP	1D (%)	YTD (%)
USD/INR	87.6	0.0	2.3
EUR/INR	101.8	(0.0)	14.4
GBP/INR	117.8	(0.1)	9.6
JPY/INR	0.6	(0.0)	8.6
EUR/USD	1.2	(0.0)	12.0

Securities Lending & Borrowing Scheme (SLBS)

Stock	Underlying LTP	Futures LTP	Spread (%)
INDIGO	6118.0	6084.0	0.6
DELHIVERY	478.0	475.9	0.4
MARUTI	14450.0	14391.0	0.4
SBICARD	821.0	817.7	0.4
APLAPOLLO	1,650.0	1,644.0	0.4

For more news related item, refer to **News Section**

Nifty & Bank Nifty – Pivot Levels – 26/08/2025

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	24968	24900	24833	24772	25028	25089	25156
Bank Nifty	55139	55022	54906	54764	55280	55422	55538

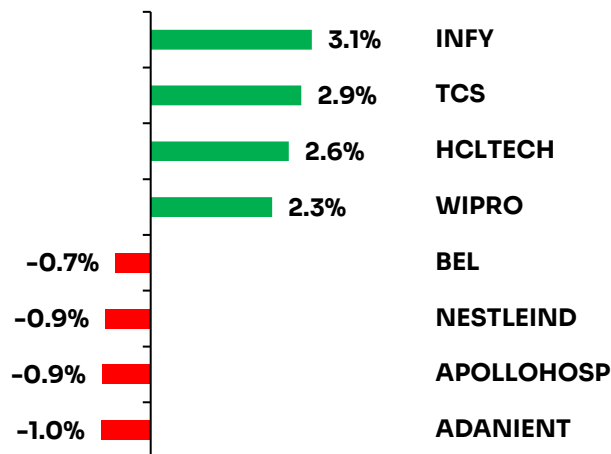
Global Macro Events (26th Aug 2025)

Event	Previous	Forecasted
India		
United States		
Durable Goods Orders MoM JUL	-9.30%	-2.50%
Durable Goods Orders Ex Transp MoM JUL	0.20%	-0.40%
Fed Barkin Speech		
Durable Goods Orders ex Defense MoM JUL	-9.40%	-2.10%
Non Defense Goods Orders Ex Air JUL	-0.70%	-0.50%
Redbook YoY AUG/23	5.90%	
S&P/Case-Shiller Home Price YoY JUN	2.80%	2.70%
House Price Index JUN	434.4	434
House Price Index MoM JUN	-0.20%	-0.10%
House Price Index YoY JUN	2.80%	
S&P/Case-Shiller Home Price MoM JUN	0.40%	0.20%
CB Consumer Confidence AUG	97.2	96
Richmond Fed Manufacturing Index AUG	-20	-19
Richmond Fed Manufacturing Shipments Index AUG	-18	-20
Richmond Fed Services Revenues Index AUG	2	1
Dallas Fed Services Index AUG	2	1
Dallas Fed Services Revenues Index AUG	6.3	6
2-Year Note Auction	3.92%	
Money Supply JUL	\$22.02T	
Great Britain		
BoE L Mann Speech		

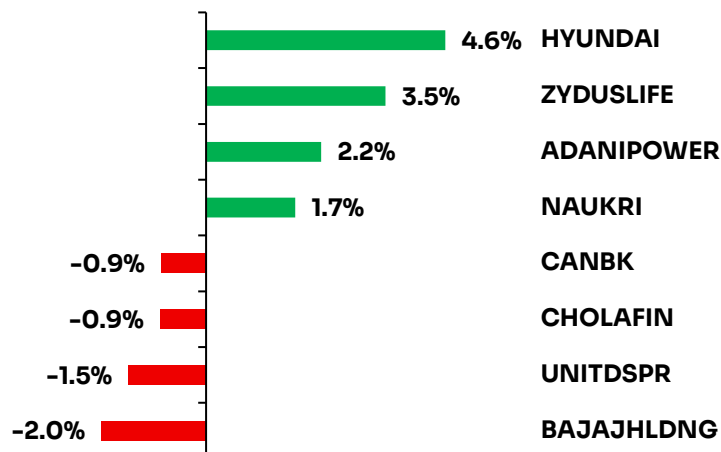
Source: tradingeconomies.com

Top Gainers and Losers

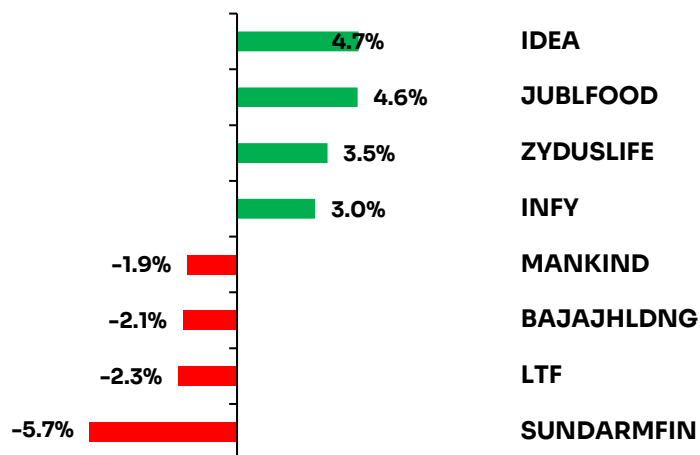
Nifty 50



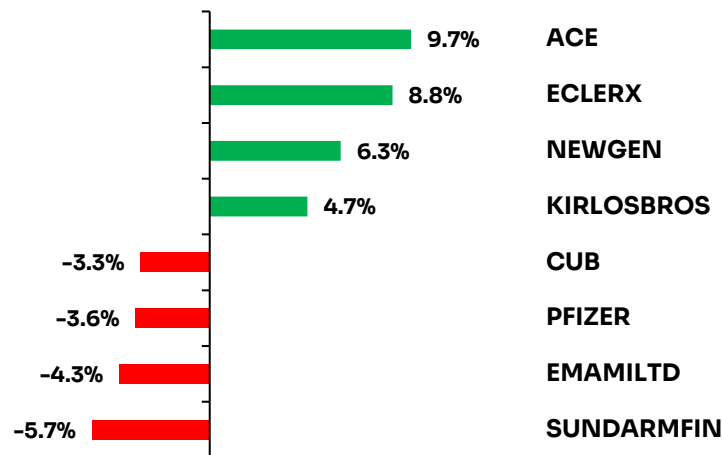
Nifty Next 50



Nifty 200



Nifty 500



Technical Board - Nifty 50								
Stock*	CMP	5 DMA	20 DMA	50 DMA	100 DMA	200 DMA	Trend	RSI
ADE	2303	2362	2365	2486	2460	2432	Uptrend	40
ADSEZ	1340	1354	1356	1394	1356	1265	Downtrend	44
APHS	7851	7876	7506	7360	7143	6978	Downtrend	66
APNT	2493	2562	2475	2406	2375	2359	Neutral	53
AXSB	1070	1079	1072	1135	1153	1110	Neutral	38
BAF	901	897	884	912	909	834	Downtrend	52
BHARTI	1931	1919	1904	1932	1880	1751	Neutral	55
BHE	372	377	384	400	368	326	Neutral	36
BJAUT	8750	8715	8297	8339	8289	8493	Neutral	65
BJFIN	1964	1974	1947	1991	1997	1864	Uptrend	50
CIPLA	1601	1569	1539	1512	1500	1487	Neutral	68
COAL	380	382	381	385	390	390	Strong Uptrend	47
DRRD	1284	1261	1248	1274	1239	1238	Downtrend	59
EIM	5991	5938	5679	5615	5525	5259	Uptrend	73
ETERNAL	319	321	310	282	257	252	Strong Uptrend	64
GRASIM	2814	2847	2772	2769	2720	2608	Neutral	54
HCLT	1504	1483	1480	1588	1583	1681	Neutral	48
HDFCB	1964	1988	1995	1984	1942	1838	Neutral	43
HDFCLIFE	787	793	767	772	752	696	Neutral	60
HMCL	5064	5067	4625	4447	4234	4216	Neutral	69
HNDL	716	707	690	681	658	647	Neutral	62
HUVR	2632	2624	2528	2439	2392	2374	Strong Uptrend	65
ICICIBC	1433	1437	1450	1441	1426	1348	Strong Uptrend	45
IIB	771	776	791	827	807	882	Neutral	39
INFO	1532	1471	1468	1550	1537	1687	Downtrend	59
ITC	399	405	411	415	420	426	Neutral	32
JIOFIN	320	327	325	318	291	283	Strong Downtrend	46
JSTL	1058	1072	1052	1036	1020	992	Neutral	53
KMB	1983	2011	1995	2101	2112	1985	Neutral	41
LT	3603	3610	3609	3588	3521	3513	Downtrend	50
MM	3399	3382	3255	3196	3057	2992	Neutral	66
MSIL	14452	14234	12988	12743	12456	12080	Strong Uptrend	83
NEST	1153	1168	1128	1173	1179	1145	Strong Uptrend	51
NTPC	338	338	336	337	342	341	Neutral	51
ONGC	237	238	237	242	242	245	Neutral	44
PWGR	284	287	288	292	296	297	Downtrend	39
RELIANCE	1413	1410	1396	1444	1404	1329	Strong Downtrend	50
SBILIFE	1847	1862	1846	1829	1764	1616	Neutral	52
SBIN	816	826	811	809	801	791	Neutral	51
SHFL	621	621	623	651	653	622	Neutral	45
SUNP	1657	1635	1646	1665	1695	1727	Downtrend	52
TATA	160	160	159	159	154	148	Neutral	50
TATACONS	1082	1087	1067	1082	1100	1033	Neutral	53
TCS	3141	3057	3052	3233	3335	3663	Neutral	54
TECHM	1527	1504	1481	1573	1533	1592	Neutral	53
TRENT	5423	5468	5287	5518	5450	5758	Neutral	52
TTAN	3651	3591	3460	3495	3451	3368	Neutral	71
TTMT	687	686	668	678	679	707	Uptrend	55
UTCEM	12606	12792	12404	12231	11906	11548	Uptrend	56
WPRO	254	248	246	257	252	274	Neutral	55

For RSI, > 75 overbought, < 25 oversold. * Stock name is as per Bloomberg Code

52 W High

Stock	LTP		New 52W/H price	Prev.High	Prev. High Date
MARUTI	14450	▲	14478	14478	25-Aug-25
TVSMOTOR	3283.4	▼	3318	3318	25-Aug-25
HDFCAMC	5885	■	5927.5	5927.5	25-Aug-25
PAYTM	1280.9	▼	1291.6	1277.8	22-Aug-25
UNOMINDA	1283.5	▼	1294	1294	25-Aug-25

52 W Low

Stock	LTP		New 52W/L price	Prev.Low	Prev. Low Date
COHANCE	895	■	880.7	880.7	25-Aug-25
SUNCLAY	1649.7	▲	1649.7	1649.7	25-Aug-25
POLYPLEX	1009	■	1003.4	1003.4	25-Aug-25
AGARIND	795	▼	792.2	792.2	25-Aug-25
SHIVALIK	490	▼	488.05	488.05	25-Aug-25

Volume Shockers

Stock	LTP	% chg in price	Volume	Avg Volume	% chg in Vol
KCK Industries	45	5	507,500	13,600	3632%
Krishival Foods	430	5	32,140	1,200	2578%
Praxis Home Ret	14	5	1,596,723	62,438	2457%
Netweb	2,372	2	3,039,690	163,390	1760%
Nazara	1,116	4	11,954,824	705,279	1595%
BEW Engineering	158	3	15,500	1,125	1278%
Cool Caps	77	6	112,500	8,400	1239%
Rategain Travel	527	7	6,020,000	472,458	1174%
Jeena Sikho	716	1	212,889	18,612	1044%
Tega Industries	1,892	1	193,391	24,591	686%
TECHLABS	586	5	133,500	20,600	548%
Krishna Institu	757	5	353,357	59,456	494%

Bulk Deals

Stock	Client Name	Action	Quantity Traded	Weighted Avg Price
ACE	GRAVITON RESEARCH CAPITAL LLP	BUY	6,67,598	1072.75
ACE	GRAVITON RESEARCH CAPITAL LLP	SELL	6,67,598	1073.56
AFFORDABLE	URVI HEMAL SHAH	SELL	63355	359.02
ALLTIME	GRAVITON RESEARCH CAPITAL LLP	BUY	3,41,965	328.51
ALLTIME	GRAVITON RESEARCH CAPITAL LLP	SELL	3,41,965	328.68
AMCL	ASCENT WEALTH	SELL	1,24,800	165
AMCL	ASHO INVESTMENT AND ADVISORY PRIVATE LIMITED .	SELL	64800	166.5
AMCL	AVNISHKUMAR DHIRAJLAL GAJERA	BUY	3,96,800	164.95
AMCL	DHIRAJLAL NAGJIBHAI GAJERA	BUY	1,82,400	166.1
APOLLO	GRAVITON RESEARCH CAPITAL LLP	BUY	46,65,954	241.78
APOLLO	GRAVITON RESEARCH CAPITAL LLP	SELL	46,65,954	241.86
APOLLO	HRTI PRIVATE LIMITED	BUY	20,18,908	242.31
APOLLO	HRTI PRIVATE LIMITED	SELL	16,14,960	242.27
APOLLO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	26,74,390	242.03
APOLLO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	26,74,390	242.14
APOLLO	QE SECURITIES LLP	BUY	19,38,529	241.4
APOLLO	QE SECURITIES LLP	SELL	19,83,974	241.64
CAPINVIT	CIM INVESTMENT FUND ICAV	BUY	29,20,000	79.45
CONNPLEX	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	SELL	1,00,000	189.02
CONNPLEX	SETU SECURITIES PRIVATE LIMITED	BUY	1,00,000	189.14
FLYSBS	ISHAAN TRADEFIN LLP	BUY	88200	673.16
FLYSBS	ISHAAN TRADEFIN LLP	SELL	87000	662.58
FLYSBS	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	SELL	95400	639.94
FLYSBS	RITU BAPNA	BUY	3,69,600	654.09
FLYSBS	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	43800	658.13
FLYSBS	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	1,03,800	646.84
GRMOVER	PASHUPATI CAPITA SER PVT LTD	BUY	1,17,038	376.6
GRMOVER	PASHUPATI CAPITA SER PVT LTD	SELL	3,30,273	374.49
IZMO	D3 STOCK VISION LLP	BUY	1,40,699	643.56
IZMO	D3 STOCK VISION LLP	SELL	1,40,749	637.28
IZMO	NEO APEX SHARE BROKING SERVICES LLP	BUY	92797	641.79
IZMO	NEO APEX SHARE BROKING SERVICES LLP	SELL	1,02,797	644.37
IZMO	NEO APEX VENTURE LLP	BUY	94748	641.59
IZMO	NEO APEX VENTURE LLP	SELL	1,24,748	636.17
IZMO	SHARE INDIA SECURITIES LIMITED	BUY	2,51,910	636.62

Stock	Client Name	Action	Quantity Traded	Weighted Avg Price
IZMO	SHARE INDIA SECURITIES LIMITED	SELL	2,52,322	630.72
JKPAPER	GRAVITON RESEARCH CAPITAL LLP	BUY	13,69,348	399.67
JKPAPER	GRAVITON RESEARCH CAPITAL LLP	SELL	13,69,348	400.05
KROSS	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	7,04,812	204
KROSS	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	7,04,812	204.12
KROSS	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	9,81,858	204.68
KROSS	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	9,81,858	205
KROSS	GRAVITON RESEARCH CAPITAL LLP	BUY	14,96,677	203.99
KROSS	GRAVITON RESEARCH CAPITAL LLP	SELL	14,96,677	204.2
KROSS	HRTI PRIVATE LIMITED	BUY	5,66,949	203.67
KROSS	HRTI PRIVATE LIMITED	SELL	4,55,336	203.98
KROSS	IRAGE BROKING SERVICES LLP	BUY	4,93,182	204.06
KROSS	IRAGE BROKING SERVICES LLP	SELL	3,70,971	204.21
KROSS	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	13,27,510	203.74
KROSS	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	13,27,510	203.93
KROSS	MICROCURVES TRADING PRIVATE LIMITED	BUY	4,30,913	204.02
KROSS	MICROCURVES TRADING PRIVATE LIMITED	SELL	4,30,913	204.27
KROSS	MUSIGMA SECURITIES	BUY	13,25,129	204.27
KROSS	MUSIGMA SECURITIES	SELL	13,25,129	204.37
KROSS	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	6,85,465	204.01
KROSS	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	6,85,465	204.11
KROSS	QE SECURITIES LLP	BUY	10,43,508	204.04
KROSS	QE SECURITIES LLP	SELL	10,53,459	203.96
LLOYDSE-RE	AGARWAL RAVI	SELL	1,45,10,000	28.03
LLOYDSE-RE	HALAN AJAY KUMAR MAHABIR PRASAD	BUY	20,00,000	28.5
LLOYDSE-RE	HALAN ANJU AJAYKUMAR	BUY	20,00,000	28.5
LLOYDSE-RE	HALAN ASHA OM HARI	BUY	20,00,000	27.37
LLOYDSE-RE	HALAN NARAYAN HARI MAHABIR PRASAD	BUY	20,00,000	28.5
LLOYDSE-RE	HALAN OM HARI MAHABIR PRASAD	BUY	20,00,000	28.5
LLOYDSE-RE	HALAN PAVAN KUMAR MAHABIR PRASAD	BUY	20,00,000	28.5
LLOYDSE-RE	HALAN PRAVINA PAVAN KUMAR	BUY	20,00,000	28.5
LLOYDSE-RE	HALAN SUJATA VIMALHARI	BUY	20,00,000	27.37
LLOYDSE-RE	HALAN VIMAL HARI MAHABIR PRASAD	BUY	20,00,000	28.5
LLOYDSE-RE	HARI HALAN VISHAKHA NARAYAN	BUY	20,00,000	27.37
LLOYDSE-RE	PRAGYA REALTY DEVELOPERS PRIVATE LIMITED	SELL	1,09,08,810	28.03

Stock	Client Name	Action	Quantity Traded	Weighted Avg Price
LLOYDSE-RE	SUNDER MARMO GRANI LLP	BUY	15,00,796	27.02
MAGNUM	NNM SECURITIES PVT LTD	BUY	3,90,000	25.11
MAGNUM	SHARE INDIA SECURITIES LIMITED	SELL	3,79,766	25.11
MALUPAPER	ANKITA VISHAL SHAH	BUY	92173	43.35
MALUPAPER	ANKITA VISHAL SHAH	SELL	92173	45.47
MBEL	GRAVITON RESEARCH CAPITAL LLP	BUY	3,60,013	472.57
MBEL	GRAVITON RESEARCH CAPITAL LLP	SELL	3,60,013	472.5
NAZARA	GRAVITON RESEARCH CAPITAL LLP	BUY	9,25,981	1073.1
NAZARA	GRAVITON RESEARCH CAPITAL LLP	SELL	9,25,009	1073.14
NAZARA	HRTI PRIVATE LIMITED	BUY	7,71,360	1077.02
NAZARA	HRTI PRIVATE LIMITED	SELL	7,62,464	1076.56
NEWGEN	GRAVITON RESEARCH CAPITAL LLP	BUY	8,17,542	923.57
NEWGEN	GRAVITON RESEARCH CAPITAL LLP	SELL	8,17,542	924.14
NGIL	L7 HITECH PRIVATE LIMITED	BUY	1,34,022	32.49
NGIL	L7 HITECH PRIVATE LIMITED	SELL	1,44,791	29.75
NGIL	MNM STOCK BROKING PVT LTD	BUY	2,13,769	30.58
NGIL	MNM STOCK BROKING PVT LTD	SELL	2,42,876	32.14
OLAELEC	HRTI PRIVATE LIMITED	BUY	2,18,80,907	48.34
OLAELEC	HRTI PRIVATE LIMITED	SELL	2,57,05,924	48.3
ORIENTLTD	IRAGE BROKING SERVICES LLP	BUY	71809	92.8
ORIENTLTD	IRAGE BROKING SERVICES LLP	SELL	12153	93.25
ORIENTLTD	ORION STOCKS LTD	BUY	35968	93.39
ORIENTLTD	ORION STOCKS LTD	SELL	1,00,962	93.1
PARTH	ISHAAN TRADEFIN LLP	SELL	1,51,200	267.28
ROHLTD	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	1,60,155	493.05
ROHLTD	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	1,67,439	486.81
ROHLTD	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1,83,396	492.58
ROHLTD	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1,83,396	492.83
RSYSTEMS	GRAVITON RESEARCH CAPITAL LLP	BUY	7,65,134	475.87
RSYSTEMS	GRAVITON RESEARCH CAPITAL LLP	SELL	7,65,134	476.23

Stock	Client Name	Action	Quantity Traded	Weighted Avg Price
SABAR	SAMBHAV DAWAR	BUY	90,000	5.42
SADHNANIQ	NEO APEX VENTURE LLP	SELL	24,00,000	7.26
SHANTI	AYUSH KACHOLIA	SELL	1,25,723	10.11
SHANTI	HEMAL ARUNBHAI MEHTA	BUY	80200	10.1
TEMBO	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	1,07,770	620.82
TEMBO	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	1,07,770	620.85
TGBHOTELS	TEJESH HASMUKH SHAH	SELL	2,09,522	11.89
TNPL	LIFE INSURANCE CORPORATION OF INDIA	SELL	4,00,000	171
UNIVASTU	VARUN KRISHNAVTAR KABRA	BUY	94877	277.61
UNIVASTU	VARUN KRISHNAVTAR KABRA	SELL	94873	276.9

Block Deals

Stock	Client Name	Action	Quantity Traded	Weighted Avg Price
No Block Deals				

Insider Trading

Stock	Name of the Acquirer/ Disposer	Action	% shareholding Prior	% shareholding Post
DHTL	Paulson Paul Thazhathedath	Pledge Invoke	23.71	4.71
DHTL	Hans Albert Lewis	Pledge Invoke	23.71	3.57
FSL	Firstsource Employee Benefit Trust	Sell	0.9	0.89
HCLTECH	HCL Technologies Stock Options Trust	Sell	0.14	0.14
HCLTECH	HCL Technologies Stock Options Trust	Sell	0.14	0.14
JBCHEPHARM	Nikhil Ashokkumar Chopra	Sell	0.06	0
JBCHEPHARM	Nikhil Ashokkumar Chopra	Pledge Revoke	0.06	0.06
JBCHEPHARM	Nikhil Ashokkumar Chopra	Pledge	0.06	0.06
JSWSTEEL	JSW Steel Employees Welfare Trust ? JSWSL OPJ Samruddhi Plan 2021 A/c	Sell	0.23	0.22
JSWSTEEL	JSW Steel Employees Welfare Trust ? JSWSL OPJ Samruddhi Plan 2021 A/c	Sell	0.23	0.23
JSWSTEEL	JSW Steel Employees Welfare Trust ? OPJ ESOP Plan 2021 A/c	Sell	0.23	0.23
JSWSTEEL	JSW Steel Employees Welfare Trust ? JSWSL OPJ Samruddhi Plan 2021 A/c	Sell	0.23	0.22
JSWSTEEL	JSW Steel Employees Welfare Trust ? JSWSL OPJ Samruddhi Plan 2021 A/c	Sell	0.23	0.23
JSWSTEEL	JSW Steel Employees Welfare Trust ? OPJ ESOP Plan 2021 A/c	Sell	0.23	0.23
KRISHANA	MAHENDRA KUMAR OSTWAL	Buy	0.52	0.61
MASTEK	UMMED SINGH NAHATA	Sell	4.26	3.93
MBAPL	MAHENDRA KUMAR OSTWAL	Buy	0.19	0.26
NIITMTS	Rajan Venkataraman	Sell	0.15	0
SEAMECLTD	HAL OFFSHORE LIMITED	Buy	70.36	70.48
SGFIN	Sorabh Dhawan	Sell	0.06	0.02
SGFIN	Sorabh Dhawan	Sell	0.06	0.02
SHYAMCENT	Bhawna Agarwal	Sell	0.18	0.16
SHYAMCENT	Sumitra Devi Agarwal	Sell	0.17	0.15
SKP	SHRINAND KAMLAKAR PALSHIKAR	Buy	36.88	36.95
STARCEMENT	VINAY AND COMPANY	Sell	0.19	0.18
TRANSRAILL	Asiana Fund I	Sell	4.7	3.78
VGINFOTECH	SACHIN PURUSHOTTAM PANDE	Buy	29.94	30
ZEEMEDIA	AUV Innovations LLP	Buy	3.83	5.43
ZUARI	Zuari Industries Limited	Pledge Revoke	20	20

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

Company	Purpose
ARIHANTCAP	Other business matters
CREATIVE	Other business matters
DROSYSTEMS	Fund Raising/Other business matters
EIFFL	Other business matters
GATECH	Other business matters
GATECHDVR	Other business matters
HUBTOWN	Other business matters
LAXMICOT	Other business matters
LOTUSDEV	Financial Results
MAHASTEEL	Other business matters
QUINTEGRA	Other business matters
SAKUMA	Other business matters
UEL	Bonus/Other business matters

News Section

Stock News

- **Tata Consultancy Services Limited (CMP: 3140.75, MCap: 1,136,350, Sector: IT Services, Valuation: 21.92xFY26 P/E)**
TCS enabled ICICI Lombard to deliver a fully automated multi-region disaster recovery solution on AWS Cloud, enhancing the insurer's operational resilience and showcasing TCS's expertise in cloud solutions.
News Source: [TCS](#)
- **Mahindra & Mahindra Limited (CMP: 3399.65, MCap: 422,756, Sector: Automotive, Valuation: 24.04xFY26 P/E)**
The company appointed Mr. Avinash Rao as MD & CEO of Mahindra Susten, strengthening leadership in its renewable energy business to drive strategic growth in the sector.
News Source: [M&M](#)
- **Wipro Limited (CMP: 253.7, MCap: 265,962, Sector: IT Services, Valuation: 20.25xFY26 P/E)**
A joint venture, JNK Chemdist Technologies Private Limited, was incorporated on August 20, 2025, potentially enhancing Wipro's presence in chemical distribution technology solutions.
News Source: [WIPRO](#)
- **One 97 Communications Limited (CMP: 1276.2, MCap: 81,482, Sector: Financial Services, Valuation: 324.65xFY26 P/E)**
The company announced the closure of operations of First Games Technology Private Limited, a strategic move that may streamline focus on core businesses or reduce operational costs.
News Source: [PAYTM](#)
- **IRB Infrastructure Developers Limited (CMP: 45.06, MCap: 27,211, Sector: Infrastructure, Valuation: 8.83xFY26 EV/EBITDA)**

The company's subsidiary, VM7 Expressway Private Limited, received a Provisional Completion Certificate, marking progress in infrastructure development and potential revenue recognition.

News Source: [IRB](#)

- **PTC Industries Limited (CMP: 14227.5, MCap: 21,318, Sector: Industrial Manufacturing, Valuation: 146.15x FY26 P/E)**

The company appointed Baljinder Singh Koura as Vice President - Operations, Aerospace Castings at Aerolloy Technologies Limited, strengthening leadership in its aerospace division for future growth.

News Source: [PTCIL](#)

- **TTK Prestige Limited (CMP: 655.95, MCap: 8,983, Sector: Consumer Durables, Valuation: 35.05x FY26 P/E)**

The company resumed production at its Roorkee plant after floods, ensuring continuity of operations and mitigating potential revenue loss due to prior disruptions.

News Source: [TTKPRESTIG](#)

- **Bharat Bijlee Limited (CMP: 2898.5, MCap: 3,276, Sector: Electrical Equipment, Valuation: 17.02x TTM EV/EBITDA)**

The company announced capacity addition, which could enhance production capabilities and support future growth in its electrical equipment business.

News Source: [BBL](#)

- **Avantel Limited (CMP: 151, MCap: 4,001, Sector: Telecommunications, Valuation: 45.21x TTM EV/EBITDA)**

The company received orders/contracts, enhancing its order book and potential revenue from telecommunications or related sectors.

News Source: [AVANTEL](#)

- **Suraj Estate Developers Limited (CMP: 324.25, MCap: 1,549, Sector: Real Estate, Valuation: 10.39xTTM EV/EBITDA)**
The company announced the acquisition of land at Lower Parel, Mumbai, marking a significant expansion in a prime real estate market that could boost future development projects and revenue potential.
News Source: [SURAJEST](#)
- **Shree Digvijay Cement Co. Ltd (CMP: 103.55, MCap: 1,531, Sector: Cement, Valuation: 55.28xTTM P/E)**
The Exchange sought clarification regarding a news report on Adani Group eyeing the company's plant and port assets, indicating potential acquisition interest worth ₹800-850 crore that could significantly impact ownership structure and valuation.
News Source: [SHREDIGCEM](#)
- **Tolins Tyres Limited (CMP: 155.85, MCap: 615, Sector: Tyres, Valuation: 15.76xTTM P/E)**
The company launched Heavy-Duty Tractor Rear Tyres, expanding its agricultural product portfolio and potentially strengthening its market position in the tyre industry.
News Source: [TOLINS](#)
- **Vibhor Steel Tubes Limited**
The company commenced supply of ERW and GI pipes from its newly commissioned 1.56 lakh MT greenfield plant (Unit III) in Odisha, expanding production capacity and market reach.
News Source: [VIBHOR](#)
- **Unicommerce Esolutions Limited**
The company partnered with Woodenstreet to strengthen e-commerce operations, enhancing its platform's capabilities and market reach for order management solutions.
News Source: [UNICOMMERCE](#)

- **Highway Infrastructure Limited**

The company bagged orders/contracts related to the Kiratpur project, enhancing its infrastructure project portfolio and future revenue potential.

News Source: [HILINFRA](#)

Companies with Investor Presentation or Annual Report Entries

- **Hariom Pipe Industries Limited**

News Source: [HARIOMPIPE](#)

- **Persistent Systems Limited**

News Source: [PERSISTENT](#)

- **Allied Blenders and Distillers Limited**

News Source: [ABDL](#)

- **Aarti Industries Limited**

News Source: [AARTIIND](#)

- **Pritika Auto Industries Limited (Two Entries)**

News Source: [PRITIKAUTO1](#)

News Source: [PRITIKAUTO2](#)

- **M & B Engineering Limited (Two Entries)**

News Source: [MBEL1](#)

News Source: [MBEL2](#)

- **Precision Camshafts Limited**
News Source: [PRECAM](#)
- **IVP Limited**
News Source: [IVP](#)
- **FSN E-Commerce Ventures Limited**
News Source: [NYKAA](#)
- **Raghav Productivity Enhancers Limited**
News Source: [RPEL](#)

Macro/Non-Stock News

- **ET WLF 2025: India will be AI powerhouse soon, says CEO of Boston Consulting Group**
At the ET World Leaders Forum 2025, BCG CEO predicts India's fast rise as a global AI leader due to increased investments, talent pipeline, and digital infrastructure, emphasizing localization and partnerships.
News Source: [Economic Times](#)
- **Seize the opportunity, invest boldly: RBI Guv Sanjay Malhotra**
RBI Governor Sanjay Malhotra urges Indian investors and policymakers to invest confidently amid favorable global economic trends, highlighting resilience and the role of policy stability and technology.
News Source: [Economic Times](#)
- **India's AI ambition gets a government boost**
Policy changes and government initiatives accelerate India's progress toward AI leadership through innovation, research, startup funding, and favorable regulatory environments to attract global talent.

News Source: [Economic Times](#)

- **No hype, just rise: The power play of women's sport**

Women's sports in India see rapid progress, breaking stereotypes with growing investment, strong medal prospects, increased sponsorship, and grassroots programs creating new stars.

News Source: [Economic Times](#)

- **Reliance AGM: Mukesh Ambani to spring yet another surprise?**

Investors anticipate major announcements from Reliance's AGM, including a potential Jio IPO, expansions in retail, energy, quick-commerce, and AI innovations, amid expected regulatory changes.

News Source: [Economic Times](#)

- **US Senator Mike Lee asks if it is time to pause H1-B visas**

Senator Mike Lee questions whether the US should suspend issuing H1-B visas amid concerns of misuse, following Walmart's denial of allegations, impacting skilled worker migration policies.

News Source: [Livemint](#)

- **Gaming firms take the game to the next level in court**

Online gaming companies challenge recent bans in court, arguing the legislation violates constitutional rights under Articles 14 and 19, citing impact on jobs and innovation.

News Source: [Livemint](#)

- **Decision on Vi relief after talks with PM and finance ministry, says MoS telecom**

The government will decide on a relief package for Vodafone Idea after discussions with the PM and Finance Ministry, addressing the company's rising debts and AGR dues.

News Source: [Livemint](#)

- **Rajiv Anand takes charge as MD and CEO of troubled IndusInd Bank**
Veteran banker Rajiv Anand becomes MD & CEO of IndusInd Bank amidst efforts to stabilize the institution, leveraging his Axis Bank experience for recovery.
News Source: [Livemint](#)
- **Nvidia shares climb over 2% as AI giant's earnings date nears**
Nvidia shares rose 2% ahead of its closely-watched AI-driven earnings report, with investors expecting robust demand for AI semiconductor chips.
News Source: [Livemint](#)
- **PNB credit card business to get a fresh push onwards**
Punjab National Bank is set to accelerate its credit card business starting November with new incentives and product upgrades for customer acquisition.
News Source: [Livemint](#)
- **First Dr Reddy's, now Natco: Why Indian drugmakers are suing Novo Nordisk**
Indian pharma giants like Dr Reddy's and Natco escalate legal battles over patent rights to blockbuster weight-loss drugs against Novo Nordisk for generic access.
News Source: [Livemint](#)
- **Inside India's food delivery mutiny—restaurants fight back Zomato, Swiggy**
Indian restaurants unite to challenge Zomato and Swiggy's dominance and high fees, exploring collective bargaining and direct-order platforms as strategies.
News Source: [Livemint](#)
- **Lemon Tree Hotels stock hinges on a costly makeover**
Lemon Tree Hotels' stock prospects depend on its expensive rebranding and property renovations, with investors advised to monitor payoffs and balance sheet impacts.

News Source: [Livemint](#)

- **Russia to hire more Indians for machinery, electronics sectors as rift with US continues**

Russia plans to recruit more Indian professionals in manufacturing sectors amid US disputes, indicating deepening Indo-Russian economic ties.

News Source: [Financial Express](#)

- **Trump says he ‘paid zero for Intel’ stake: ‘Will make such deals all day long’**

Trump claims to have acquired Intel shares at no cost, boasting of similar future deals, sparking skepticism and controversy over political-business links.

News Source: [Financial Express](#)

- **Durable sales take a hit ahead of GST cut**

Sales of consumer durables drop as buyers await GST rate cuts, with sluggish demand affecting large home appliances and electronics.

News Source: [Financial Express](#)

- **‘No matter how much pressure comes...’: PM Modi's promise to small entrepreneurs amid US tariffs**

PM Modi assures India’s small entrepreneurs that the government won’t bow to global pressure amid US tariffs, pledging policy support for MSMEs.

News Source: [Business Today](#)

- **India Inc worried about domestic demand slowdown: BT-C Fore Business Confidence Survey**

A survey reveals Indian businesses’ concerns over sluggish domestic demand and rising costs, with cautious outlooks despite medium-term optimism.

News Source: [Business Today](#)

- **Trump pushes 1,500% drop in drug prices as pharma firms face Sept 29 deadline and tariffs**
Trump mandates a steep cut in drug prices by September 29, enforced with tariffs, impacting global supply chains including India's generics.
News Source: [Business Today](#)
- **India is making a bad bet on China, warns Stanford's Sumit Ganguly**
Stanford professor Sumit Ganguly cautions that India's engagement with China is risky, predicting negative economic and strategic consequences without revision.
News Source: [Business Today](#)
- **Double firepower: Udaygiri, Himgiri to join Navy fleet, what makes these stealth frigates key**
Indian Navy to induct stealth frigates Udaygiri and Himgiri, enhancing maritime defense with advanced navigation and multi-mission capabilities.
News Source: [Business Today](#)
- **Smart Factories and the Future of Manufacturing: AI and Industry 4.0 Take Centre Stage**
India's manufacturing sector accelerates adoption of smart factories with AI and IoT, examining investments, use cases, and workforce upskilling needs.
News Source: [Business Today](#)
- **From highways to hardship: 30,000 Indian truckers earning ₹40-92 lakh hit by US visa freeze**
Sudden US ban on work visas and commercial licenses leaves 30,000 Indian truckers jobless or stranded, disrupting livelihoods and migration plans.
News Source: [Business Today](#)
- **Rural inclusion push: Now, buy mutual funds from post offices**
India Post will sell mutual funds at 1.64 lakh post offices, enabling rural investment and

bridging the urban-rural wealth gap.

News Source: [Business Today](#)

- **NDB appoints Rajiv Ranjan as Vice President for five-year term**

Rajiv Ranjan, RBI veteran, appointed as Vice President of the New Development Bank for five years, expected to strengthen NDB's strategies.

News Source: [The Hindu Business Line](#)

- **Influenza vaccination, building greater awareness vital in public healthcare: Zydus**

Zydus emphasizes the importance of influenza vaccination and public health awareness to combat outbreaks and reduce disease burden in India.

News Source: [The Hindu Business Line](#)

- **Hilton to open its second hotel in Hyderabad**

Hilton announces plans for a second hotel in Hyderabad, targeting growing tourism and business travel demand in southern India.

News Source: [The Hindu Business Line](#)

- **Facing hassles in customs clearance, pharma exporters to Pakistan seek clarity from DGFT on norms**

Indian pharma exporters to Pakistan urge DGFT for clear regulations due to customs clearance delays, aiming for smoother cross-border trade.

News Source: [The Hindu Business Line](#)

- **RPG Group geared up for expansion across key verticals: Anant Goenka**

RPG Group prepares to scale up in core sectors like infrastructure and technology, with Anant Goenka outlining growth strategies.

News Source: [The Hindu Business Line](#)

- **Data Focus: Urban floods — Rising waters, failing systems**
Data-driven analysis on India's increasing urban floods due to inadequate drainage, poor planning, and climate change, urging policy action.
News Source: [The Hindu Business Line](#)
- **CBI files criminal case against Anil Ambani**
The CBI has registered a criminal case against Anil Ambani, with full details confidential, amid growing scrutiny on corporate figures.
News Source: [The Hindu Business Line](#)
- **Promoter stakes slip to two-decade low as retail, MFs tighten grip on India Inc**
Promoter shareholding in Indian companies drops to 20-year lows as retail and mutual fund investors increase ownership, signaling market democratization.
News Source: [The Hindu Business Line](#)
- **Automakers caution festival sales slump, push Govt for early GST relief**
Automobile manufacturers warn of a festive season sales downturn due to high costs, urging quick GST cuts to revive market momentum.
News Source: [The Hindu Business Line](#)

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