



Markets at Glance

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Indian Market & Key Indicators

Index/Indicator Name	Current Value	Change (pts)	Change (%)
⬆️ GIFT NIFTY	25,175.00	+91.00	+0.36%
⬇️ NIFTY50	25,060.90	-29.80	-0.12%
⬇️ SENSEX	82,186.81	-13.53	-0.02%
⬇️ BANK NIFTY	56,756.00	-196.75	-0.35%
⬇️ NIFTY MIDCAP 100	59,103.40	-364.95	-0.61%
⬇️ NIFTY SMALLCAP 100	18,893.35	-64.95	-0.34%






Key Market Indicators

Index/Indicator Name	Current Value	Change (pts)	Change (%)
⬇️ INDIA VIX	10.75	-0.45	-4.04%
⬆️ USD/INR	86.34	+0.07	+0.08%
⬆️ DOLLAR INDEX (DXY)	97.48	+0.09	+0.09%







US Markets

Market Index	Current Value	Change (pts)	Change (%)
 S&P 500	6,309.62	+4.02	+0.06%
 NASDAQ COMPOSITE	20,892.69	-81.48	-0.39%
 DOW JONES	44,502.44	+179.37	+0.40%



Europe Markets

Market Index	Current Value	Change (pts)	Change (%)
 DAX (GERMANY)	24,041.90	-265.90	-1.09%
 FTSE 100 (UK)	9,023.80	+10.81	+0.12%



Asian Markets

Market Index	Current Value	Change (pts)	Change (%)
 NIKKEI (JAPAN)	41,053.44	+1278.52	+3.21%
 HANG SENG (HONG KONG)	25,254.23	+124.20	+0.49%
 SHANGHAI COMPOSITE (CHINA)	3,593.14	+11.28	+0.31%



Cryptocurrency (USD)

Market Index	Current Value	Change (pts)	Change (%)
 BITCOIN	119,114.16	-885.29	-0.74%
 ETHEREUM	3,735.58	-13.13	-0.35%
 SOLANA	201.85	-3.83	-1.86%



Yesterday's Scorecard | NIFTY 500

Top Gainers

Company Name	Change (%)
ETERNAL .	+10.32%
RHI MAGNESITA INDIA	+7.56%
THE INDIA CEMENTS	+6.74%
SWIGGY	+5.89%
GUJARAT MINERAL DEVE...	+5.31%

Top Losers

Company Name	Change (%)
360 ONE WAM	-6.25%
ZEE ENTERTAINMENT EN...	-6.23%
AARTI INDUSTRIES	-4.06%
ZENSAR TECHNOLOGIES	-3.86%
RAYMOND LIFESTYLE	-3.83%

52 Week High

Company Name	LTP (₹)
ETERNAL .	₹299.75
GUJARAT MINERAL DEVE...	₹459.00
THE RAMCO CEMENTS	₹1191.30
SHREE CEMENT	₹32400.00
DALMIA BHARAT	₹2321.20

52 Week Low

Company Name	LTP (₹)
TEJAS NETWORKS	₹625.70

Market Statistics



Volume Shockers

Company Name	Volume
RHI MAGNESITA INDIA	4.76x
INDIA CEMENTS	3.60x
ETERNAL	3.49x
LATENT VIEW ANALYTIC	3.45x
SWIGGY	3.23x



Sector Performance & Market Flows

Top 3 Performers (1-Day)

Bottom 3 Performers (1-Day)

Sector Name	Change (%)	Sector Name	Change (%)
CPSE	+0.24%	MEDIA	-2.27%
ENERGY	-0.14%	PSU BANK	-1.57%
PSE	-0.15%	REALTY	-1.01%

Top 3 Performers (7-Day)

Bottom 3 Performers (7-Day)

Sector Name	Change (%)	Sector Name	Change (%)
REALTY	+2.03%	IT	-1.11%
AUTO	+1.38%	PSU BANK	-0.99%
METAL	+1.33%	PSE	-0.56%

FII DII Activity (Cash)

Period	📉 FII (₹ Cr)	📈 DII (₹ Cr)
22 Jul 2025	-3,549	+5,240
21 Jul 2025	-1,681	+3,578
Last 1 Week	-10,408	+14,966
Last 2 Weeks	-16,708	+23,380
Last 30 Days	-18,594	+46,600



Global Market Brief

1. **US Markets (July 22, 2025):**

US stock futures remained mostly flat ahead of major earnings. The S&P 500 edged up for a third consecutive record close, while the Nasdaq ended its winning streak. Recent gains were led by technology and industrials. (*Investopedia, Bloomberg*)

2. **General Motors Hit by Tariffs:** GM's Q2 profits fell 35% amid \$1.1 billion in US tariffs. While North American demand partly offset losses, trade tensions remain a major headwind. (*Economic Times*)

3. **Asian Markets (July 22, 2025):**

Asian equities advanced as markets focused on corporate earnings and tariff negotiations. Japanese markets reopened post-holiday after the ruling coalition suffered a defeat in upper house elections. (*Business Standard*)

4. **Hang Seng Index:**

The index hit a multi-year high amid renewed Chinese policy stimulus hopes. (*Economic Times*)



Indian Market Brief

1. Equity Indices (July 22, 2025):

Sensex dipped 13.53 points to close at 82,186.81, while Nifty declined 29.80 points to settle at 25,060.90 in a volatile session. *(Economic Times, The Hindu BusinessLine)*

a. Broader markets also ended lower – Nifty Midcap 100 fell 0.6% and Nifty Smallcap 100 by 0.3%. *(Economic Times)*

2. Sectoral & Stock Trends:

a. Pharma (-1%), Auto (-0.74%), and IT (-0.47%) weighed on benchmarks. Bank and FMCG sectors also saw weakness. *(Economic Times)*

b. Small- and mid-cap indices declined marginally. *(Economic Times)*

3. Top Gainers (July 22, 2025):

a. **Info Edge (India) Ltd.:** Surged +4.37% following Eternal's rally. Its **12.38% stake** is now valued at ₹37,226 crore, making up **over a third** of Info Edge's total market cap, driven by Eternal's strong revenue and stock performance despite profit softness *(Economic Times)*

b. **Eternal Ltd. (Zomato):** +11.78% to ₹303.70, driven by Blinkit's strong performance. Deepinder Goyal's net worth rose by ₹2,000 crore in two days. *(Economic Times, The Hindu BusinessLine)*

c. **Cement Stocks:** India Cements (+6.74%), Shree Cements (+2.59%), Ambuja (+1.33%), Dalmia Bharat (+2.46%), Nuvoco Vistas (+1.48%). Sector buoyed by UltraTech's ₹2,000 crore quarterly capex plan. This expansionary move has instilled



confidence in the industry's growth prospects, leading to positive movements in the stock prices of several major cement companies. (*Economic Times, Angel One*)

d. **RHI Magnesita India Ltd.:** +7.56% to ₹516.25 (*Economic Times*)

4. Top Losers:

a. **Canara Bank:** -3.55%

b. **IRFC:** -2.7% following a 551% three-year rally and pre-Q1 result volatility (*Economic Times*)

c. **360 One Wam Ltd.:** Share declined 6.2%. The decline is primarily attributed to a block deal where BC Asia Investments X Ltd., an entity linked to Bain Capital, reportedly sold a 3.71% stake in the company for ₹1,741 crore through open market transactions. (*Economic Times*)

d. **Aarti Industries:** -4.02% (*Economic Times*)

e. **Zee Entertainment:** -6% post weak Q1 revenue where the revenue fell 14% YoY (*Economic Times*)

5. Earnings Impact – Q1 FY26 Highlights:

a. **Paytm:** ₹122.5 crore net profit vs ₹838.9 crore loss YoY. Revenue up ~28%. (*The Hindu BusinessLine, StartupTalky*)

b. **Zee Entertainment:** Net profit up 22% YoY to ₹144 crore, revenue down 14%. (*Economic Times*)

c. **M&M Financial Services:** Net profit rose 6% YoY to ₹530 crore; Net interest income (NII) increased 20% to ₹2,267 crore (*Moneycontrol, Economic Times*)

d. **PNB Housing Finance:** Net profit ₹533.5 crore (+23.2% YoY);



revenue up 14% (*Angel One*)

e. **Dhanlaxmi Bank:** Net profit ₹12.18 crore vs ₹8 crore loss YoY (*Angel One*)

f. **Oberoi Realty:** Net profit down 28% YoY to ₹421.2 crore (*Angel One*)

g. **Colgate:** Net profit down 11.8% to ₹320 crore; revenue down 4.3% (*The Hindu BusinessLine*)

h. **Mahanagar Gas:** Net profit ₹317.79 crore (10% Y-o-Y increase) (*The Hindu BusinessLine*)

i. **Dixon Technologies:** Net profit doubled YoY to ₹280 crore on 95% revenue growth (*Economic Times*)

Macro & Geopolitical Watch

1. Currency Update:

The Rupee fell 5 paise to 86.36/USD amid uncertainty over the US-India trade deal. (*The Hindu BusinessLine*)

2. US-India Trade Deal:

Hopes for a pre-August 1 interim trade pact have diminished due to unresolved tariff and market access disputes. (*Reuters*)

3. EU Sanctions on Russia:

The EU's 18th sanction package bans imports of refined oil from third countries using Russian crude. This will impact Indian private sector refiners' which were exporting to Europe using discounted Russian oil. (*Reuters, Economic Times*)



4. **UK Immigration Overhaul:**

New UK visa rules raise salary thresholds and reduce eligible job categories for Indian migrants. (*Business Standard*)

Business & Corporate News

1. **Jindal Steel & Power** rebranded to **Jindal Steel Ltd.** (*The Hindu BusinessLine*)
2. **JSW Steel** targets 50 MTPA capacity by 2030 via Paradip project in Odisha. (*The Hindu BusinessLine*)
3. Mutual funds reduced stakes in **private banks** for the second consecutive month, with fund managers describing it as a "tactical shift" amid market dynamics. (Source: X: @moneycontrolcom)
4. **Bajaj Finance:** Leadership changes – Anup Saha steps down, Rajeev Jain becomes VC & MD. (*Angel One*)
5. **BP-chartered tanker** left Nayara Energy port without loading scheduled diesel for Africa. (*Reuters*)
6. US-retail giant **Costco** is setting up its first Global Capability Centre (GCC) in Hyderabad; 1,000 initial hires. (*Business Standard, StartupTalky*)
7. **VIP Clothing** ties up with Blinkit for instant delivery of products. (*Press Trust India, The Hindu BusinessLine*)



8. **Over 400 cooperative banks** reported losses totaling ₹7,300 crore over three years, prompting government review. *(MoneylifeIndia)*

Key Startup News (India)

1. **Milky Mist** files for ₹2,035 crore IPO to repay debt, expand Perundurai facility. *(StartupTalky, BusinessLine)*
2. **IndiQube** raised ₹314 crore from Motilal Oswal and Aditya Birla for expansion. *(IndianStartupNews)*

Key Events to Watch Today

1. **Corporate Earnings – US Majors:**
Key Q2 results due from **Alphabet (Google), Tesla, IBM, T-Mobile US, ServiceNow, AT&T, Thermo Fisher, NextEra Energy, and Boston Scientific.** *(Investopedia)*
 - a. Focus: Google's AI roadmap, Tesla's robotaxi launch and core auto business
 - b. Impact: Strong earnings may uplift global sentiment; weak prints could weigh on markets



SPOTLIGHT TODAY

🚫 Stocks in Ban (3 stocks)

- | | |
|---------------------------------|--------------------|
| 1. Bandhan Bank | 3. Rbl Bank |
| 2. Indian Energy Exch... | |



Result Calendar

- | | |
|-------------------------------------|-------------------------------------|
| 1. Infosys | 18. Westlife Foodworld |
| 2. TATA Consumer Pro... | 19. Sapphire Foods India |
| 3. Dr Reddys Laborato... | 20. CMS Info Systems |
| 4. Bajaj Housing Finan... | 21. RattanIndia Power |
| 5. SRF | 22. HMT |
| 6. Persistent Systems | 23. Mahindra Holidays ... |
| 7. Oracle Financial Ser... | 24. Thyrocare Technol... |
| 8. COFORGE | 25. MAS Financial Servi... |
| 9. Syngene International | 26. Sky Gold and Diam... |
| 10. Aditya Birla Real Est... | 27. Cigniti Technologies |
| 11. Force Motors | 28. Bharat Bijlee |
| 12. Bikaji Foods Interna... | 29. Monarch Network ... |
| 13. Maharashtra Scoot... | 30. Senores Pharmace... |
| 14. PCBL Chemical | 31. Pondy Oxides & Ch... |
| 15. Supreme Petrochem | 32. Filatex India |
| 16. Syrma SGS Technol... | 33. Dynamic Cables |
| 17. Tata Teleservices (...) | |





Quote of the Day

"In investing, what is comfortable is rarely profitable."

— Robert Arnott



Word of the Day

MARGIN TRADING

Margin trading is like taking a loan from your broker to invest in stocks—essentially, you're using borrowed money to amplify your buying power. Picture it as leveraging your existing capital to purchase more shares than you could with just your own funds.

While this can lead to larger profits, it also magnifies your losses if the market doesn't play nice. For example, let's say you want to invest in a hot tech stock currently priced at ₹1,000. If you have ₹50,000, you could buy 50 shares outright. But with margin trading, you might borrow an additional ₹50,000, allowing you to snag 100 shares instead. If the stock rises to ₹1,200, your profit is ₹20,000. However, if it drops to ₹800, you could be staring down a loss of ₹20,000—and that's before you pay back the broker. Think of margin trading as a double-edged sword: it can cut your way to riches or leave you bleeding in the market. Choose wisely!





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