



Markets at Glance

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Indian Market & Key Indicators

Index/Indicator Name	Current Value	Change (pts)	Change (%)
⬆️ GIFT NIFTY	25,285.00	+36.00	+0.14%
⬆️ NIFTY50	25,219.90	+159.00	+0.63%
⬆️ SENSEX	82,726.64	+539.83	+0.66%
⬆️ BANK NIFTY	57,210.45	+454.45	+0.80%
⬆️ NIFTY MIDCAP 100	59,307.10	+203.70	+0.34%
⬆️ NIFTY SMALLCAP 100	18,893.20	-0.15	-0.00%



Key Market Indicators

Index/Indicator Name	Current Value	Change (pts)	Change (%)
⬆️ INDIA VIX	10.52	-0.23	-2.16%
⬆️ USD/INR	86.32	+0.02	+0.02%
⬆️ DOLLAR INDEX (DXY)	97.16	-0.05	-0.05%





US Markets

Market Index	Current Value	Change (pts)	Change (%)
⬆️ S&P 500	6,358.91	+49.29	+0.78%
⬆️ NASDAQ COMPOSITE	21,020.02	+127.33	+0.61%
⬆️ DOW JONES	45,010.29	+507.85	+1.14%



Europe Markets

Market Index	Current Value	Change (pts)	Change (%)
⬆️ DAX (GERMANY)	24,240.82	+198.92	+0.83%
⬆️ FTSE 100 (UK)	9,061.50	+37.69	+0.42%



Asian Markets

Market Index	Current Value	Change (pts)	Change (%)
⬆️ NIKKEI (JAPAN)	41,983.50	+812.18	+1.97%
⬆️ HANG SENG (HONG KONG)	25,677.51	+139.44	+0.55%
⬆️ SHANGHAI COMPOSITE (CHINA)	3,596.37	+14.08	+0.39%



Cryptocurrency (USD)

Market Index	Current Value	Change (pts)	Change (%)
⬆️ BITCOIN	119,032.32	+253.23	+0.21%
⬆️ ETHEREUM	3,650.67	+21.34	+0.59%
⬆️ SOLANA	191.21	+1.71	+0.90%



Yesterday's Scorecard | NIFTY 500

Top Gainers

Company Name	Change (%)
MANGALORE REFINERY A...	+7.38%
OLA ELECTRIC MOBILIT...	+6.55%
ELGI EQUIPMENTS	+6.10%
CREDITACCESS GRAMEEN	+5.42%
OLECTRA GREENTECH	+5.15%

Top Losers

Company Name	Change (%)
MACROTECH DEVELOPERS	-7.65%
ADITYA BIRLA REAL ES...	-5.51%
TRIVENI TURBINE	-4.90%
MASTEK	-4.05%
ZEE ENTERTAINMENT EN...	-3.95%

52 Week High

Company Name	LTP (₹)
CREDITACCESS GRAMEEN	₹1349.00
JM FINANCIAL	₹178.68
FORTIS HEALTHCARE	₹832.00
L&T FINANCE	₹213.50
GE VERNOVA T&D INDIA	₹2500.00

52 Week Low

Company Name	LTP (₹)
TEJAS NETWORKS	₹616.10
COLGATE PALMOLIVE (I...	₹2286.00

Market Statistics

Advance

Decline



283

216

Volume Shockers

Company Name	Volume
CREDITACCESS GRAMEEN	4.11x
ELGI EQUIPMENTS	3.37x
WESTLIFE FOODWORLD	3.27x
GODREJ AGROVET	3.03x
MANGALORE REFINERY	3.00x



Sector Performance & Market Flows

Top 3 Performers (1-Day)

Bottom 3 Performers (1-Day)

Sector Name	Change (%)	Sector Name	Change (%)
AUTO	+0.85%	REALTY	-2.60%
BANK	+0.80%	MEDIA	-0.94%
PHARMA	+0.49%	FMCG	-0.52%

Top 3 Performers (7-Day)

Bottom 3 Performers (7-Day)

Sector Name	Change (%)	Sector Name	Change (%)
METAL	+1.78%	PSU BANK	-1.41%
AUTO	+0.73%	REALTY	-1.40%
BANK	+0.36%	FMCG	-1.27%

FII DII Activity (Cash)

Period	📈 FII (₹ Cr)	📉 DII (₹ Cr)
23 Jul 2025	-4,209	+4,358
22 Jul 2025	-3,549	+5,240
Last 1 Week	-12,759	+18,101
Last 2 Weeks	-20,994	+26,817
Last 30 Days	-22,803	+50,958



Global Market Brief

1. **U.S. stock markets rallied:** Dow gained over 500 points; S&P 500 set new intraday highs, lifted by major earnings optimism from companies like Alphabet and Tesla, as well as progress in trade talks. (Reuters)
2. **Alphabet (Google's parent) raised its capital spending target to \$85B**, citing massive cloud demand. The company also forecast more capex in 2026, indicating bullishness on continued AI infrastructure investments. (Reuters).
3. **European & Japanese stocks surged** on the US-Japan trade deal, with optimism for broader easing of trade tensions
4. **Asia:**
On July 23, 2025, Asian markets displayed a strong positive trend, largely influenced by the announcement of a US-Japan trade agreement. This deal sparked optimism for further trade resolutions, boosting investor confidence and driving indices like Japan's Nikkei 225 sharply higher. The positive sentiment extended to other Asian markets, with most indices closing in positive territory, though South Korea's market saw a slight dip. (The Hindu BusinessLine)



Indian Market Brief

1. Indices:

Sensex rose 539 points to 82,726.64, and Nifty50 gained 159 points to close at 25,219.90, lifted by global cues and Q1 earnings. Broader indices were mixed; Nifty MidCap 100 gained 0.34%, BSE Smallcap closed flat. (Economic Times, Moneycontrol, Zerodha Pulse)

2. Sector & Stock Movements:

- a. Nifty Auto (+0.85%), Financial Services (+0.84%), and Metal (+0.48%) led sectoral gains.
- b. Nifty Realty (-2.6%) was the worst performer, with Lodha Developers sliding 7% post block deals.
- c. Top gainers (Nifty 50): Tata Motors, Bharti Airtel, Bajaj Finance, Maruti Suzuki.
- d. Top Losers (Nifty 50): Hindustan Unilever, Infosys, UltraTech Cement, BEL. (Zerodha Pulse)

3. Q1 Results – Key Movers:

- a. **Infosys:** Q1 PAT up 9% YoY; revenue rose 8%. ADRs rose 3%. Beats estimates. (Economic Times, CNBC)
- b. **Dr. Reddy's:** PAT rose 2% YoY to ₹1,418 crore; revenue up 11%. (Economic Times)
- c. **Tata Consumer:** PAT up 15% YoY to ₹334 crore; revenue grew 10%.
- d. **Persistent Systems:** PAT rose 7.4% QoQ to ₹425 crore; revenue up 3% QoQ. Other highlights include a substantial increase in other income, strong year-over-year revenue and



profit growth, and robust deal wins for the quarter. (Moneycontrol)

e. **Sky Gold & Diamonds:** Profit doubled to ₹43 crore; revenue jumped 56% YoY. (NDTV Profit)

f. **Westlife Foodworld:** Net profit dropped 62% to ₹1.22 crore despite revenue growth of 6.45% to ₹653 crore in sales. (NDTV Profit)

g. **AB Real Estate:** Reported ₹27 crore net loss in Q1. (Economic Times)

h. **Eternal** zips past DMart in market cap as Blinkit shines. (@livemint)

4. **Currency:**

Amid a strong American currency and outflow of foreign funds, Rupee fell for the sixth session, ending 3 paise lower at 86.41/USD. (Economic Times, Hindu Business Line)

5. **FII/DII Activity:**

FIIs net **sold** shares worth ₹4,209 crore; DIIs net **bought** ₹4,358 crore on July 23. (Moneycontrol)

6. **Corporate Bonds:**

Indian firms raised a record ₹10 trillion in 2025 via bonds, led by NBFCs and private placements. (Economic Times)



Macro & Geopolitical Watch

1. **U.S.-Japan Trade Deal:**

President Trump announced a deal with 15% reciprocal tariffs, lifting global sentiment. The agreement sets aside the higher 25% tariff that was set to be imposed on August 1. This deal is seen as a positive development for Japan's auto industry, which accounts for a significant portion of its exports to the US. However, US automakers have expressed dissatisfaction, noting that they still face a higher 25% tariff on imports from their plants in Canada and Mexico. (Saxo Bank, Economic Times)

Japan's Nikkei 225 index surged around **2% today**, driven by optimism surrounding a major **U.S.-Japan trade deal**.

2. **U.S.-EU Tensions:**

US Treasury Secretary Bessent hinted at 30% tariffs on EU imports pending trade talks, pressuring European equities. (Saxo Bank)

3. **India-UK Relations:**

PM Modi began a two-day visit to the UK to review trade, technology, defense, climate, and education ties under the CSP framework. (Economic Times)

4. **RBI Risk Note:**

RBI economists warned of underpriced macroeconomic risks and rising global tariffs nearing 1930s levels. (Economic Times)

5. **FDI & Remittances:**

Net FDI inflows fell 98% YoY in May due to **increased**



repatriation. Outward remittances dropped to \$2.3 billion. (Economic Times)

Business & Corporate News

1. During Q1 FY26, FII's have trimmed their stakes in 6 **Adani** Group companies, reallocating investments and offloading shares worth ₹4,640 crore. This move reflects a shifting investment strategy among offshore investors towards the conglomerate's diverse businesses. Adani Ports & SEZ and Adani Power emerged as exceptions where, FIIs increased their stakes by ₹284 crore and ₹200 crore respectively. (AngelOne)
2. **Oil India:**
In talks with Petrobras, Exxon, Total for joint oil block bids. (Livemint)
3. **SBI Vision:**
Aims to be among top 10 global banks by market cap within 5 years. (Moneycontrol)
4. **Myntra:**
Under ED investigation for alleged ₹1,654 crore FDI violations. (Moneycontrol)
5. **IPO Buzz:**
 - a. **Brigade Hotel Ventures IPO** opens, targeting ₹759.6 crore at ₹85–90/share.



b. **GNG Electronics IPO** subscribed 9x on Day 1; strong GMP seen (hinting over 40% listing gain). (Moneycontrol)

6. **SEBI Reform:**

Plans to ease stake dilution norms for large IPOs to aid mega-unicorns. (Economic Times)

Key Startup News (India)

1. **Startup Highlights:**

a. **IndiQube IPO:** Retail and employee tranches fully subscribed on Day 1.

b. **Olto (AI startup):** Raised \$5.1M for global expansion. (YourStory)

c. **Maruti-DPIIT Partnership:** For auto-tech mentorship.

Key Events to Watch Today

1. **Fed Chair Powell Speech:**

Closely watched for any hints on rate path. Political pressures and inflation risks in focus. (Times of India)

2. **Major Indian Corporate Earnings (Q1FY26)**

Bajaj Finance, Nestlé India, SBI Life Insurance, CG Power & Industrial Solutions, Indian Bank, Hexaware Technologies, KFin Technologies, UTI AMC, Indian Energy Exchange



Spotlight Today

Stocks in F&O Ban (3 stocks)

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



Result Calendar

- | | |
|-----------------------------------|-------------------------------------|
| 1. Bajaj Finance | 17. Aditya Birla Sun Life... |
| 2. Nestle India | 18. Karur Vysya Bank |
| 3. SBI Life Insurance | 19. KFin Technologies |
| 4. CG Power and Indu... | 20. Anant Raj |
| 5. REC | 21. UTI Asset Manage... |
| 6. Adani Energy Soluti... | 22. eClerx Services |
| 7. Canara Bank | 23. LT Foods |
| 8. Indian Bank | 24. Indian Energy Exch... |
| 9. Coromandel Interna... | 25. Trident |
| 10. Motilal Oswal Finan... | 26. Cyient |
| 11. Supreme Industries | 27. IndiGrid Infrastruct... |
| 12. Hexaware Technolo... | 28. Aether Industries |
| 13. MphasiS | 29. Tanla Platforms |
| 14. Phoenix Mills | 30. Ujjivan Small Financ... |
| 15. APL Apollo Tubes | 31. eMudhra |
| 16. ACC | 32. Unimech Aerospac... |

... and more companies



IPO DESK

COMPANY	PRICE	SIZE	LOT	TIMELINE	BUSINESS
Property Share Investment Trust - Propshare Titani SME	₹1000000 - ₹1060000	₹472.97 Cr	1	Subscription period: July 21, 2025 to July 25, 2025 Listing date: 30/07/2025	It manages and leases Grade A+ commercial office space in Mumbai's Thane region, offering stable rental income.
TSC India Ltd SME	₹68 - ₹70	₹25.89 Cr	2000	Subscription period: July 23, 2025 to July 25, 2025 Listing date: 30/07/2025	A travel management company providing comprehensive air ticketing and corporate travel solutions across India.
Brigade Hotel Ventures Ltd Mainline	₹85 - ₹90	₹759.60 Cr	166	Subscription period: July 24, 2025 to July 28, 2025 Listing date: 31/07/2025	Owns and develops premium hotels in prime South Indian cities, partnering with global hospitality brands to deliver.
Monarch Surveyors and Engineering Consultants Ltd SME	₹237 - ₹250	₹93.75 Cr	600	Subscription period: July 22, 2025 to July 24, 2025 Listing date: 29/07/2025	Provides comprehensive civil engineering consultancy services including surveying, mapping, design, and project.



IPO DESK

COMPANY	PRICE	SIZE	LOT	TIMELINE	BUSINESS
GNG Electronics Ltd Mainline	₹225 - ₹237	₹460.44 Cr	63	Subscription period: July 23, 2025 to July 25, 2025 Listing date: 30/07/2025	Specializes in refurbishing laptops, desktops, and ICT devices, offering warranty and global sales.
Indiqube Spaces Ltd Mainline	₹225 - ₹237	₹700.00 Cr	63	Subscription period: July 23, 2025 to July 25, 2025 Listing date: 30/07/2025	This business operates flexible, tech-driven workspaces across major Indian cities, offering managed offices.





Quote of the Day

"If you don't study any companies, you have the same success buying stocks as you do in a poker game if you bet without looking at your cards."

— Peter Lynch



Word of the Day

LIQUIDATION PREFERENCE

Liquidation preference is the order of payout established during a company's winding-up process, ensuring that certain investors, typically preferred shareholders, get their money back before common shareholders see a dime. Essentially, it's like being at a buffet where some diners get to choose dessert first while others wait until the end — it's all about who gets served first when the pie is being sliced up. Consider a startup that's just been acquired for ₹100 crores.

If the preferred shareholders have a 1x liquidation preference, they'll receive their investment back (say, ₹20 crores) before any common shareholders get anything. This can significantly affect the returns for common shareholders, especially in scenarios where the sale price is just enough to cover preferred payouts. Think of it as a VIP pass at a concert: those with it get to enjoy the show without worrying about getting stuck in the crowd.





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