



Markets at Glance

Last Updated: 8:11 AM



Indian Market & Key Indicators

Index/Indicator Name	Current Value	Change (pts)	Change (%)
⬆️ GIFT NIFTY	24,605.00	+52.00	0.21%
⬇️ NIFTY50	24,426.85	-74.05	-0.30%
⬇️ SENSEX	79,809.65	-270.95	-0.34%
⬇️ BANK NIFTY	53,655.65	-164.75	-0.31%
⬇️ NIFTY MIDCAP 100	55,727.40	-320.10	-0.57%
⬇️ NIFTY SMALLCAP 100	17,227.00	-67.30	-0.39%



Key Market Indicators

Index/Indicator Name	Current Value	Change (pts)	Change (%)
⬇️ INDIA VIX	11.75	-0.43	-3.51%
⬆️ USD/INR	88.15	+0.03	+0.03%
⬇️ DOLLAR INDEX (DXY)	97.73	-0.04	-0.04%





US Markets

Market Index	Current Value	Change (pts)	Change (%)
✕ S&P 500	6,460.26	-41.60	-0.64%
✕ NASDAQ COMPOSITE	21,455.55	-249.65	-1.15%
✕ DOW JONES	45,544.88	-92.02	-0.20%



Europe Markets

Market Index	Current Value	Change (pts)	Change (%)
✕ DAX (GERMANY)	23,902.21	-137.69	-0.57%
✕ FTSE 100 (UK)	9,187.30	-29.52	-0.32%



Asian Markets

Market Index	Current Value	Change (pts)	Change (%)
✕ NIKKEI (JAPAN)	41,890.40	-828.07	-1.94%
⬆️ HANG SENG (HONG KONG)	25,597.68	+520.06	+2.07%
⬆️ SHANGHAI COMPOSITE (CHINA)	3,871.25	+13.32	+0.35%



Cryptocurrency (USD)

Market Index	Current Value	Change (pts)	Change (%)
✕ BITCOIN	107,629.27	-622.47	-0.58%
✕ ETHEREUM	4,384.06	-7.12	-0.16%
✕ SOLANA	198.44	-2.42	-1.21%



Friday's Scorecard | NIFTY 500

Top Gainers

Company Name	Change (%)
SAMMAAN CAPITAL	+5.28%
GRANULES INDIA	+4.91%
NAVA	+4.63%
CG POWER AND INDUST...	+4.52%
RBL BANK	+4.44%

Top Losers

Company Name	Change (%)
VARDHMAN TEXTILES	-6.26%
JINDAL STAINLESS	-5.36%
IDBI BANK	-4.46%
SWAN ENERGY	-4.25%
WELSPUN CORP	-4.07%

52 Week High

Company Name	LTP (₹)
CREDITACCESS GRAMEEN	₹1395.00
HBL ENGINEERING	₹808.50
DALMIA BHARAT	₹2395.90
AUTHUM INVESTMENT & ...	₹3225.00
UNO MINDA	₹1275.90

52 Week Low

Company Name	LTP (₹)
HFCL	₹69.90
FIVE-STAR BUSINESS F...	₹549.00
ROUTE MOBILE	₹848.00
KNR CONSTRUCTIONS	₹190.87
PRAJ INDUSTRIES	₹390.95

Market Statistics



Volume Shockers

Company Name	Volume
SAMMAAN CAPITAL	2.98x
ACC	2.69x
SUN TV NETWORK	2.68x
HBL ENGINEERING	2.68x
AAVAS FINANCIERS	2.68x



Sector Performance & Market Flows

Top 3 Performers (1-Day)

Sector Name	Change (%)
FMCG	+0.95%
MEDIA	+0.35%
MNC	+0.22%

Bottom 3 Performers (1-Day)

Sector Name	Change (%)
REALTY	-1.33%
AUTO	-0.88%
IT	-0.87%

Top 3 Performers (7-Day)

Sector Name	Change (%)
PHARMA	-0.75%
FMCG	-0.92%
MNC	-1.17%

Bottom 3 Performers (7-Day)

Sector Name	Change (%)
PSU BANK	-4.89%
REALTY	-4.72%
PSE	-3.81%

FII DII Activity (Cash)

Period



FII (₹ Cr)



DII (₹ Cr)

29 Aug 2025	-8,313	+11,488
28 Aug 2025	-3,856	+6,920
Last 1 Week	-21,152	+28,645
Last 2 Weeks	-22,712	+39,033
Last 30 Days	-53,342	+103,030



Global Market Brief

1. US Markets

- a. On August 29, all three major US indices — Dow Jones, S&P 500, and Nasdaq — closed lower, snapping a four-month winning streak. The decline was led by Dell, Nvidia, and other AI-related tech stocks following PCE inflation data. (Bloomberg, Yahoo Finance, CNBC, @ReutersBiz)
- b. The US government ended the “de minimis” exemption, removing duty-free import for packages valued under \$800. (@ReutersBiz)

2. European Markets

- a. Markets declined on Friday with all major indices in red.
- b. S&P upgraded Portugal’s rating to “A+” from “A”, highlighting regional economic resilience. (Bloomberg)
- c. British bank shares fell on speculation of a new tax on reserves held at the Bank of England. (Reuters)

3. Asian Markets

- a. Chinese manufacturing contracted for the fifth straight month (PMI at 49.4), though non-manufacturing PMI showed mild expansion. Trade tensions with the US continue to weigh on sentiment. (Mint)



- b. Chinese EV maker BYD reported a 30% drop in Q2 profit, its first quarterly decline in three years, due to price wars. (@ReutersBiz)
- c. Alibaba posted Q1 revenue of \$34.6 bn, slightly below forecasts, citing weak demand and competition. Shares later jumped nearly 15% on AI-driven revenue growth. (@ReutersBiz, @business)
- d. South Korea's exports held strong led by strong demand for semiconductors, chips and autos despite US tariffs. (@business)

Indian Market Brief

- 1. On August 29, Sensex fell 0.3% to 79,809.65 and Nifty to 24,426.85, marking the third consecutive session of decline, first weekly, and second monthly loss. (Trading Economics, Indian Express)
- 2. Weakness was driven by FII outflows and US tariffs on Indian exports. (Trading Economics)
 - a. **Laggards:** Mahindra & Mahindra, Reliance, Infosys, NTPC, Tata Motors.
 - b. **Gainers:** ITC, Bharat Electronics, Trent, L&T.
- 3. Market volatility increased as Nifty slipped below key moving averages. Caution was noted in banks, IT, PSUs, and real estate. (Moneycontrol, ET)



4. SME segment is set for major action this week with 7 public issues. (Moneycontrol)
5. Last week, 8 of the top-10 most valued firms lost ₹2.24 lakh crore in market cap; Reliance and HDFC Bank led the decline. (@ETMarkets)

Macro & Geopolitical Watch

1. **GDP Growth:** Q1 FY26 GDP rose **7.8% YoY**, the fastest in five quarters, above estimates. Nominal GDP stood at ₹86.05 lakh crore vs. ₹79.08 lakh crore last year. This also overshoot the RBI's forecast of 6.5% for the period, which the central bank had reaffirmed earlier this month during its monetary policy review. (AngelOne)
2. **Pending GST Refunds:** Govt to release ₹1,600 crore refunds before Diwali. (@CNBCTV18Live)
3. **US Tariffs on India**
 - a. US imposed new 25% tariffs on Indian goods, lifting levies to 50% on some items. Exporters in **gems, jewellery, and mentha oil** face heavy losses, with GDP growth risked by 60–80 bps. Relief package discussions are underway. (Indian Express, Business Standard, Mint)
 - b. The US tariff shock triggered FII outflows from Indian equities, especially in IT and financials. (Economic Times)



4. **China:** August manufacturing PMI stood at 49.4, shrinking for the 5th straight month. A **score below 50** indicates manufacturing activity is shrinking, which is a **negative sign for the economy**. (Mint)
5. **Canada:** Economy shrank 1.6% in Q2 due to US tariffs, raising likelihood of a September rate cut. (Reuters)
6. **Gold:** Prices held just below its record levels amid Fed policy uncertainty and US tariffs. (@business)

Business & Corporate News

1. **Reliance Industries AGM Key Highlights:**
 - a. Stock **dropped 2.3%** after AGM, as Mukesh Ambani announced Jio IPO plans for H1 2026. (Business Standard)
 - b. RIL's stock has shown a pattern of declining after AGMs in the previous 4 years, possibly due to high expectations that are not fully met by announcements.
 - c. The IPO could potentially be the **largest in Indian history**, with analysts estimating a valuation between **\$134 billion and \$154 billion**. (ET)
 - d. Jio Platforms, which includes Reliance Jio Infocomm (India's largest telecom operator with over 500 million subscribers), has demonstrated strong financial performance, including **17% YoY revenue growth in FY25**. (News18)



- e. Reliance and **Meta** to form a JV to build open-source AI models for Indian businesses. (Indian Express)
 - f. Formation of a new AI-focused subsidiary, **Reliance Intelligence**, and partnerships with Google Cloud and Meta to drive AI adoption in India.
 - g. Emphasis on the growth potential of **Reliance Retail**, targeting a **20%+ CAGR in retail revenues over the next three years**.
2. **Hospitals vs Insurance:** Indian hospitals threatened to stop **cashless treatment** for patients of Bajaj Allianz and Care Health Insurance over issues like **low payments, delays, and deductions**. Patients would have had to pay first and claim later, but after talks, the suspension for **Bajaj Allianz was revoked**. The dispute shows ongoing tension between **hospitals asking fair pay** and **insurers cutting costs**. (Indian Express)
 3. **NCDEX** raised over ₹500 crore from Citadel, Tower Research to prepare for equities launch. (Business Standard)
 4. **Dish TV** penalised by BSE and NSE for lack of proper board strength. (Business Standard)
 5. **Indian Oil Corporation** plans to invest ₹1.66 trillion over five years for expansion. (@bsindia)
 6. **Sterlite Technologies'** US subsidiary faces a \$96.5 million penalty in a jury verdict in litigation, which is likely to weigh on investor sentiment. (NDTV Profit)



7. **Zydus Wellness** has acquired UK-based Comfort Click for GBP 239 million, marking an overseas expansion move that could aid its growth. (NDTV Profit)
8. **GHCL Limited:** SEBI has barred GHCL chairman Anurag Dalmia from the securities market for 18 months and imposed fines, raising governance concerns. (NDTV Profit)

Key Startup News (India)

1. **BCCI** seeks ₹452 crore from jersey sponsorship rights for 3-year deal, 2025–28 cycle, for 140 matches, after Dream11 exit due to gaming ban. (@bsindia)
2. **MPL (Mobile Premier League)** lays off ~300 employees following gaming ban, shifting focus to free-to-play games and US expansion. (Moneycontrol, BusinessToday)
3. **CMR Green Technologies** filed draft IPO papers with SEBI for the 2nd time. In 2021, they got rejected for the same. (@ETMarkets)
4. **Tata Capital** plans \$2 billion IPO in late September, eyeing \$11 bn valuation. (@ETMarkets)

Key Events to Watch Today

1. **Market Reaction to GDP Data:** Q1 GDP rose 7.8%, fastest in five quarters, likely to support sentiment. (TOI, ET)



2. **GST Council Meeting (Sept 3–4):** Slab rationalisation and reforms on agenda. (TOI, Businessline)
3. **NSE Derivatives Update:** NSE has increased the **Bank Nifty derivatives trading freeze limit** from 600 to **900 contracts**, effective today, directly impacting traders and institutions in the banking space. (@ETMarkets) These limits define the maximum number of contracts that can be included in a single order for a specific derivative instrument.
4. **IMD Forecast: Above-normal** rains in September could threaten crops in north Chhattisgarh, east Rajasthan, west Haryana, south Punjab, and Uttarakhand. (@businessline)



Spotlight Today

Stocks in F&O Ban (0 stocks)

No stocks in F&O ban for today



Result Calendar

1. Brightcom Group

3. Valencia India

2. Highway Infrastruct...



IPO DESK

COMPANY	PRICE	SIZE	LOT	TIMELINE	BUSINESS
Amanta Healthcare Ltd Mainline	₹120 - ₹126	₹126.00 Cr	119	Subscription period: Sep 01, 2025 to Sep 03, 2025 Listing date: 08/09/2025	A pharmaceutical company specializing in sterile liquid formulations, parenteral products, and medical devices.
Sugs Lloyd Ltd SME	₹117 - ₹123	₹85.66 Cr	1000	Subscription period: Aug 29, 2025 to Sep 02, 2025 Listing date: 05/09/2025	An engineering and construction company providing EPC services in solar energy, electrical transmission, distribution,.
Rachit Prints Ltd SME	₹140 - ₹149	₹19.49 Cr	1000	Subscription period: Sep 01, 2025 to Sep 03, 2025 Listing date: 08/09/2025	Manufactures and supplies knitted, printed, and specialty fabrics primarily for mattress industry use.
Abril Paper Tech Ltd SME	₹61	₹ 13.42 Cr	2000	Subscription period: Aug 29, 2025 to Sep 02, 2025 Listing date: 05/09/2025	Manufactures and markets high-quality sublimation heat transfer paper for diverse textile printing applications.



IPO DESK

COMPANY	PRICE	SIZE	LOT	TIMELINE	BUSINESS
Snehaa Organics Ltd SME	₹115 - ₹122	₹ 32.17 Cr	1000	Subscription period: Aug 29, 2025 to Sep 02, 2025 Listing date: 05/09/2025	A Hyderabad-based company providing advanced solvent recovery and purification solutions to chemical and pharmaceutical.
Oval Projects Engineering Ltd SME	₹80 - ₹85	₹46.74 Cr	1600	Subscription period: Aug 28, 2025 to Sep 01, 2025 Listing date: 04/09/2025	Specializes in infrastructure development and turnkey solutions for oil, gas, power, and urban sectors.





Quote of the Day

"The market always does what it's supposed to do, but never when."

— Jesse Livermore



Word of the Day

BROKER

A broker is essentially the middleman in the world of investing — an individual or firm that buys and sells stocks, bonds, and other assets on behalf of clients. Think of them as your personal shopper for the stock market; they navigate the crowded aisles of investments to find just what you need, whether that's a high-flying tech stock or a stable blue-chip company. For example, during the recent IPO of Zomato, brokers played a crucial role, helping retail investors navigate the subscription process and ensuring that shares were allocated efficiently.

Their expertise can be the difference between landing a hot stock or watching it soar without you. Just remember, while a broker can help you buy and sell, they don't have a crystal ball — so do your homework before leaning too heavily on their recommendations. Investing without knowing is like ordering without checking the menu; you might end up with something you didn't really want!





Stay Connected

Our subscribers get these market reports, delivered on **WhatsApp**, **Mon-Fri** around **8 AM** — turning mornings into an advantage.

Not subscribed yet? **You're already missing out !**

SUBSCRIBE NOW

About The MarketScan

The MarketScan is an initiative by Optimus Nexgen Wealth Pvt Ltd, created to simplify and deliver key financial and market insights in a factual, unbiased format.

Disclaimer

All updates are based on publicly available sources such as NSE, BSE, and credible financial news platforms. We do not offer investment advice, tips, or recommendations of any kind. We are not SEBI-registered advisors or research analysts, and none of our content should be treated as financial guidance. While we aim for high accuracy, occasional errors may occur. Any investment or trading decision based on our reports is entirely your responsibility, and we recommend consulting a qualified advisor before taking action. If at any point you find that this service no longer suits your needs, you are completely free to discontinue without any obligation.

Terms of Use & Delivery

By subscribing to The MarketScan, you agree to use our reports only for personal and private use. The redistribution, resale, or public sharing of our content is not permitted without our written approval. While we aim to deliver each edition on time, occasional delays or missed deliveries may occur due to unforeseen technical or operational reasons. If that happens, feel free to reach out — we'll deliver the missed edition or share the reason, and always do our best to make it right.

Source Acknowledgement

Our content may occasionally use AI tools to improve formatting or clarity, but every edition is reviewed by a human before being shared. We cite or reference original sources where applicable and intend only to highlight, not replace—the excellent work of original publishers. Platforms like NSE, BSE, Moneycontrol, Yahoo Finance and Trendlyne, form part of our trusted data ecosystem. We believe in responsible content, and your continued use of our service signals agreement to these terms, including any updates made in the future. All services are governed under Indian laws, with exclusive jurisdiction falling under the courts of Mumbai.

For detailed guidelines, terms, and disclaimers, please visit themarketscan.in

**Have any query or
need to know more?**



CLICK HERE



FOLLOW US



FOLLOW US



FOLLOW US



TheMarketScan.in