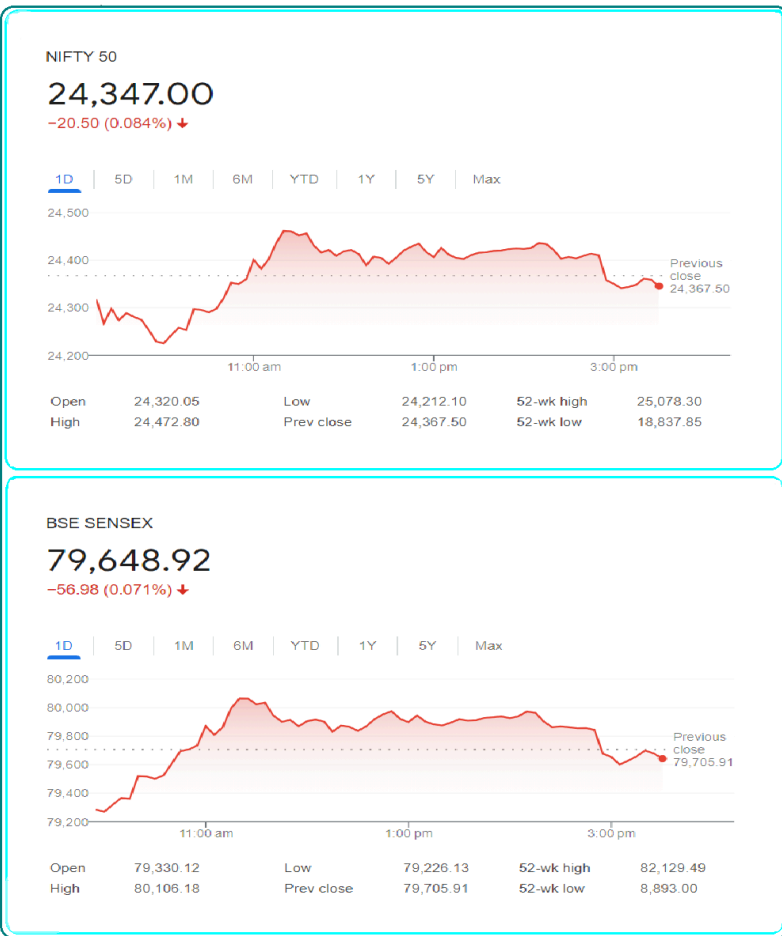


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24347.00	24367.50	<b>-0.08%</b>
<b>S&amp;P BSE SENSEX</b>	79648.92	79705.91	<b>-0.07%</b>
<b>NIFTY MID100</b>	57330.60	57174.40	<b>0.27%</b>
<b>NIFTY SML100</b>	18444.30	18410.20	<b>0.19%</b>

(Source: [NSE](#), [BSE](#))

## Sectoral Indices

Indices	Close	Previous	Change(%)
<b>NIFTY BANK</b>	50577.95	50484.50	<b>0.19%</b>

## Market Wrap Up

- The domestic equity indices ended with small losses amid Hindenburg's allegation against SEBI chairperson, Madhabi Puri Buch. The Nifty settled below the 24,350 mark after hitting the day's high of 24,472.80 in mid-morning trade.
- The S&P BSE Sensex was down 56.99 points or 0.07% to 79,648.92. The Nifty 50 index declined 20.50 points or 0.08% to 24,347.
- The S&P BSE Mid-Cap index rose 0.04% and the S&P BSE Small-Cap index added 0.51%.
- Among the sectoral indices, the Nifty Realty index (up 1.32%), the Nifty Consumer Durables index (up 0.87%) and the Nifty Oil & Gas index (down 0.54%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 2.05%), the Nifty PSU bank index (down 1.18%) and the Nifty FMCG index (down 0.79%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **August** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **7202** contracts at the end of the day.
- **Long** position build up for the **August** series has been witnessed in **ONGC, HDFCBANK, INFY**.
- **Short** position build up for the **August** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN**.
- **Unwinding** position for the **August** series has been witnessed in **ICICIBANK, BAJFINANCE, LUPIN**.

(Source: Capitaline F&O)

NIFTY AUTO	25278.95	25346.65	-0.27%
NIFTY FMCG	61668.45	62157.35	-0.79%
NIFTY IT	39109.50	39043.30	0.17%
NIFTY METAL	9106.25	9038.30	0.75%
NIFTY PHARMA	22205.60	22209.55	-0.02%
NIFTY REALTY	1035.70	1022.25	1.32%
BSE CG	72564.23	72526.33	0.05%
BSE CD	58921.65	58389.24	0.91%
BSE Oil & GAS	32069.28	31783.97	0.90%
BSE POWER	8236.38	8287.46	-0.62%

(Source: [NSE](#), [BSE](#))

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	CLOSED	35025.00	-
HANG SENG	17111.65	17090.23	0.13%
STRAITS TIMES	3235.38	3261.83	-0.81%
SHANGHAI	2858.20	2862.19	-0.14%
KOSPI	2618.30	2588.43	1.15%
JAKARTA	7297.62	7257.00	0.56%
TAIWAN	21773.26	21469.00	1.42%
KLSE COMPOSITE	1606.66	1596.05	0.66%
ALL ORDINARIES	8028.50	7990.70	0.47%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	124307.10	113940.29
NSE F&O	29115066.13	10719415.48

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4680.51

(Source: [NSE](#))

## Corporate News

- **Siemens** posted net profit jumped 25.23% to Rs 530.60 crore in June 2024 quarter as against Rs 423.70 crore reported in the same period last year. Total revenue from operations increased 6.97% year on year (YoY) to Rs 4,714.20 crore during the quarter ended 30 June 2024.
- **Zydu Lifesciences** posted consolidated net profit surged 30.64% to Rs 1,419.9 crore in Q1 FY25 as compared to Rs 1,086.9 crore posted in Q1 FY24. Revenue from operations jumped 20.77% year on year (YoY) to Rs 6,207.5 crore in the quarter ended 30 June 2024.
- **Berger Paints** posted consolidated net profit decline marginally to Rs 353.56 crore in Q1 FY25 as against Rs 354.35 crore posted in Q1 FY24. Revenue from operations stood at Rs 3091.01 crore in the June quarter, up 2.03% from Rs 3029.51 crore recorded in Q1 FY24.
- **Info Edge (India)** reported 16.2% increase in standalone net profit to Rs 232.29 crore on 9.35% rise in revenue from operations to Rs 638.90 crore in Q1 FY25 over Q1 FY24.
- **Bajaj Consumer Care** posted consolidated net profit declined 19.69% to Rs 37.12 crore in Q1 FY25 as compared with Rs 46.22 crore in Q1 FY24. Revenue from operations slipped 8.97% YoY to Rs 245.93 crore during the quarter.
- **Mamaearth parent Honasa Consumer** has announced a 63% year-on-year (YoY) increase in consolidated net profit for the June quarter of FY25, up to Rs. 40 Crore from Rs. 24 Crore in the same period last year. The company's income from operations in the June quarter increased 19% year on year (YoY) to Rs. 554 Crore, up from Rs. 466 Crore in the same period last year.
- **Hi-Tech Pipes** posted consolidated net profit jumped 62.17% to Rs 18.05 crore in Q1 FY25 as against Rs 11.13 crore posted in same quarter last year. However, revenue from operations rose by 27.3% YoY to Rs 866.98 crore in the quarter ended 30 June 2024.
- **Morepen Laboratories** reported a consolidated net profit of Rs 36.17 crore in Q1 FY25, which is a rise of 147% as compared with the PAT of Rs 14.63 crore in Q1 FY24. Net revenue increased by 14% year-over-year (YoY) to Rs 458.64 crore during the period under review.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ONGC	341.30	332.55	2.63%
HEROMOTOCO	5311.85	5207.20	2.01%
AXISBANK	1164.30	1142.75	1.89%
INFY	1797.40	1770.75	1.51%
JSWSTEEL	917.35	905.10	1.35%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
NTPC	400.85	410.65	-2.39%
ADANI PORTS	1501.40	1533.80	-2.11%
DRREDDY	6886.55	7013.50	-1.81%
BRITANNIA	5645.75	5740.30	-1.65%
SBIN	812.60	824.30	-1.42%

(Source: [Moneycontrol](#))

- **BHEL** has obtained a 1,600 MW project from Damodar Valley Corporation, set to be developed in Jharkhand's Koderma district. This coal-based power unit will be executed on an EPC basis and includes two 800 MW units. This project, the first of its capacity for DVC, will be built near existing units.
- **Dr Reddy's Laboratories Ltd** has received an Establishment Inspection Report (EIR) from the US health regulator for its formulations manufacturing units at Duvvada in Visakhapatnam, classifying the facilities to voluntary action indicated.
- **BEML Ltd** expects the rail and metro segment, along with defence, to be the biggest contributor to its revenue in the near future as it looks to bag export orders for Vande Bharat and metro trains in a few years.
- **NBCC (India) Ltd.** announced two orders totalling approximately Rs. 720 Crore. The Institute of Company Secretaries of India has placed a Rs. 9.97 Crore order to construct a new building at Anand Nagar Colony in Hyderabad, replacing the present one. The Jhansi Development Authority has issued a Rs. 710 Crore order for the sustainable development of two land parcels in Jhansi.
- **Bharat Dynamics** posted net profit dropped 82.74% to Rs 7.22 crore in Q1 FY25 as against Rs 41.82 crore recorded in Q1 FY24. Revenue from operations stood at Rs 191.17 crore in the June 2024 quarter, down 35.79% from Rs 297.72 crore reported in same quarter previous fiscal.
- **Dredging Corporation of India** posted standalone net loss stood at Rs 31.40 crore in Q1 FY25 as compared with a net profit of Rs 15.15 crore in Q1 FY24. Revenue from operations tumbled 45.73% in Q1 FY25 as against Rs 277.89 crore reported in the corresponding period last year.
- **Sun TV Network** posted standalone net profit declined 6.21% to Rs 546.98 crore in Q1 FY25 as against Rs 582.80 crore in Q1 FY23. Revenue from operations shed 3.16% to Rs 1,276.11 crore during the quarter under review.
- **Jubilant Foodworks** posted consolidated net profit surged to Rs 60.80 crore in Q1 FY25 as compared with Rs 28.91 crore in Q1 FY24. Revenue from operations jumped 44.85% YoY to Rs 1,933.06 crore during the quarter.
- **Inox Wind** reported a consolidated net profit (from continuing operations) of Rs 47.17 crore in Q1 FY25 as against a net loss of Rs 64.88 crore posted in Q1 FY24. Revenue from operations surged 83.18% year on year to Rs 638.81 crore in the quarter ended 30 June 2024.
- **Shipping Corporation of India** posted consolidated net profit grew 69.85% to Rs 291.48 crore in Q1 FY25 as against Rs 171.61 crore posted in Q1 FY24. Revenue from operations rose 26.18% year on year (YoY) to Rs 1,514.27 crore in June 2024 quarter.
- **Godrej Properties**, the real estate development arm of Godrej Industries Group, has acquired a nearly 90-acre land parcel in Khalapur locality of Raigad district in Maharashtra.
- **Granules India** said that the US Food & Drug Administration (US FDA) has approved its abbreviated new drug application (ANDA) for Trazodone Hydrochloride Tablets.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

## Global News

- Germany's wholesale prices inched down by 0.1% year-on-year in July 2024, slowing from a 0.6% drop in the previous month. On a monthly basis, wholesale prices rose 0.3% in July, after a 0.3% fall in June.
- Italy's trade surplus rose to EUR 5.1 billion from EUR 3.4 billion in the corresponding month last year. In May, there was also a surplus of EUR 6.4 billion.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

## Economic News

- Crude Oil traded at US\$ 77.71/bbl (IST 17:00).
- INR weakened to Rs. 83.97 from Rs. 83.96 against each US\$ resulting in daily change of 0.01%.
- India's coal import rose by 5.7% to 75.26 million tonnes (MT) in the first quarter of the current fiscal compared to 71.16 MT of coal in the same period of the previous fiscal. Coal imports in June were also higher by 6.59% at 22.97 MT compared to 21.55 MT in the same month of the previous fiscal, according to data compiled by mjunction services ltd, a B2B e-commerce platform from a joint venture between Tata Steel and SAIL.
- The government approved a Clean Plant Programme with an outlay of Rs 1,766 crore to improve the quality of planting material for horticultural crops, aiming to boost exports and enhance farmers' income.
- The government is exploring a new initiative to blend 5% ethanol in diesel, following its progress towards 20% ethanol blending in petrol. With ethanol blending in petrol at 15%, further trials are necessary for diesel, especially for BS-VI vehicles, to ensure vehicle performance, emissions, and fuel efficiency.

(Source: [Economic Times](#), [Business Standard](#))

## Forthcoming Events

### Board Meetings as on 13/08/2024

Hero MotoCorp Limited	Financial Results
Hindalco Industries Limited	Financial Results
Apollo Hospitals Enterprise Limited	Financial Results
Godrej Industries Limited	Financial Results
Endurance Technologies Limited	Financial Results
Federal-Mogul Goetze (India) Limited.	Financial Results
Indian Railway Catering And Tourism Corporation Limited	Financial Results
Ahluwalia Contracts (India) Limited	Financial Results
Archidply Industries Limited	Financial Results
Aries Agro Limited	Financial Results
ARSS Infrastructure Projects Limited	Financial Results
Ashoka Buildcon Limited	Financial Results
Astra Microwave Products Limited	Financial Results
Awfis Space Solutions Limited	Financial Results
Bharat Road Network Limited	Financial Results
Black Box Limited	Financial Results/Fund Raising
Easy Trip Planners Limited	Financial Results
eClerx Services Limited	Financial Results
Emami Realty Limited	Financial Results
Fertilizers and Chemicals Travancore Limited	Financial Results
Fiem Industries Limited	Financial Results
GMR Airports Infrastructure Limited	Financial Results/Fund Raising
Gujarat Narmada Valley Fertilizers and Chemicals Limited	Financial Results
Hemisphere Properties India Limited	Financial Results
HIL Limited	Financial Results
Indosolar Limited	Financial Results
IPCA Laboratories Limited	Financial Results
Isgec Heavy Engineering Limited	Financial Results
Kohinoor Foods Limited	Financial Results
Landmark Cars Limited	Financial Results
Maan Aluminium Limited	Financial Results
Manappuram Finance Limited	Financial Results/Dividend
Max Financial Services Limited	Financial Results
Muthoot Finance Limited	Financial Results
N. B. I. Industrial Finance Company Limited	Financial Results
Nazara Technologies Limited	Financial Results

NBCC (India) Limited	Financial Results
NMDC Steel Limited	Financial Results
Patel Engineering Limited	Financial Results
Piramal Enterprises Limited	Financial Results
PTC India Limited	Financial Results
Raj Television Network Limited	Financial Results
Ramky Infrastructure Limited	Financial Results
Tide Water Oil Company (India) Limited	Financial Results
Tourism Finance Corporation of India Limited	Financial Results
V.S.T Tillers Tractors Limited	Financial Results
Vishnu Prakash R Punglia Limited	Financial Results
Williamson Magor & Company Limited	Financial Results
Windlas Biotech Limited	Financial Results

(Source: NSE)

### Corporate Actions as on 13/08/2024

Bandhan Bank Limited	Dividend - Rs 1.50 Per Share
EIH Associated Hotels Limited	Dividend - Rs 6 Per Share/Bonus 1:1
Fine Organic Industries Limited	Dividend - Rs 10 Per Share
Heritage Foods Limited	Dividend - Rs 2.50 Per Share
IKIO Lighting Limited	Dividend - Re 1 Per Share
Navneet Education Limited	Dividend - Rs 2.60 Per Share
Orient Green Power Company Limited	Rights 10:51 @ Premium Rs 3/-
Patel Integrated Logistics Limited	Dividend - Re 0.10 Per Share
Precot Limited	Dividend - Rs 1.50 Per Share
S.J.S. Enterprises Limited	Dividend - Rs 2 Per Share
The Great Eastern Shipping Company Limited	Interim Dividend - Rs 9 Per Share

(Source: NSE)

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Saltlake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : [research@shriraminsight.com](mailto:research@shriraminsight.com) | [www.shriraminsight.com](http://www.shriraminsight.com) |