

Nifty Futures	Level 1	Level 2	Level 3
Resistance	24,640	24,780	24,900
Support	24,470	24,340	24,210

Indices (NSE)	Close	Pts. Chg	% Chg
Nifty 50	24,596.2	22.0	0.1
Nifty Future (August)	24,715.0	80.1	0.3
Nifty Future (Sept)	25,011.1	-86.0	-0.3
Nifty Bank	55,521.2	110.0	0.2
Nifty 100	25,185.2	28.8	0.1
Nifty 500	22,694.1	27.3	0.1
NIFTY MIDCAP 100	56,938.3	188.6	0.3

Indices (BSE)	Close	Pts. Chg	% Chg
SENSEX	80,623.3	79.3	0.1
BSE 100	25,776.8	43.2	0.2
BSE 200	11,157.3	17.2	0.2
BSE All Cap	10,415.6	10.6	0.1
BSE Midcap	45,279.1	137.1	0.3
BSE SmallCap	52,136.3	-91.7	-0.2

Sectoral Indices	Close	Pts. Chg	% Chg
Bankex	61,770.5	86.2	0.1
Capital Goods	67,848.8	-282.7	-0.4
Realty	6,936.4	-4.9	-0.1
Power	6,630.1	-24.3	-0.4
Oil & Gas	26,057.1	-44.8	-0.2
Metal	31,024.5	50.8	0.2
CD	60,039.8	109.7	0.2
Auto	53,215.8	133.5	0.3
TECK	16,945.3	70.0	0.4
IT	34,153.6	246.8	0.7
FMCG	20,350.6	-9.6	-0.1
Healthcare	43,644.3	232.0	0.5
India VIX	11.7	-0.3	0.0

Exchange	Advance	Decline	Unchange
BSE	1,751	2,297	145
NSE	1,311	1,644	71

Volume	Current Rs (in cr)	% Chg
NSE Cash	98,041.5	10.0
BSE Cash	11,918.3	14.9
NSE F&O	1,78,838.1	33.9

Net Inflows/Outflows (Rs in cr)	Buy	Sell	Net
FII	10,567.8	15,565.0	-4,997.2
DII	19,629.6	8,765.6	10,864.0

Intraday Nifty Outlook

The benchmark index ended marginally higher, reclaiming 24,600 after an intraday dip below key zone support. Despite the uptick, the broader price structure remains weak, with the index still struggling below its short-term averages. Volume rose sharply, indicating active participation near the lows, and a sharp V-Shaped recovery followed through indicating revived buyer confidence. On the options front, 24,500 saw aggressive put writing, while 24,800–25,000 CE strikes added fresh OI, hinting at a capped upside unless a sharp move clears the supply overhead. FII positioning continues to remain net short, and the index may require a broader sectoral push to generate sustained upward momentum.

Corporate News

Titan Company Ltd. Q1FY26 Result First Cut – Robust jewellery growth continues despite elevated gold price pressures

Titan's diversified portfolio across jewellery, watches, and eyecare demonstrated robust revenue growth in Q1FY26, supported by strong demand in both core and emerging segments. The jewellery business, despite facing steep gold price increases, delivered solid double-digit growth fueled by a shift in consumer preference toward plain gold and coin purchases over studded jewellery. However, increasing the gold price may dampen the customer's sentiment in the short term. The watches segment also demonstrated a strong performance in terms of revenue and margin, validating the premiumization strategy and the strong consumer connect. Moreover, its emerging business is also gaining traction and is well-positioned to capture greater market share. Further, the company continued to expand its footprint in all segments and remains focused on expanding its presence even in FY26. The company continues to focus on expanding its market share and investing in capabilities across all its business segments. Looking ahead, although elevated gold prices may present short-term headwinds by affecting customer buying behaviour, Titan's premium brand positioning and diversified product portfolio underpin a positive outlook. Post-budget stimulus and continuing premiumization trends are expected to support sustained and balanced growth throughout FY26. Titan's ongoing investments in retail expansion, product innovation, and brand building, combined with its dedication to meeting dynamic consumer preferences, position it well to capitalize on emerging opportunities and deliver consistent long-term value.

Source: BP Equities Pvt. Ltd.

AU Small Finance Bank gets RBI's 'in-principle' approval to become a universal bank

The Reserve Bank on Thursday announced that it has granted 'in-principle' approval to AU Small Finance Bank Limited (AUSFB) for transitioning from a Small Finance Bank (SFB) to a Universal Bank. After getting the SFB licence in 2015, AU Financiers commenced its journey as a small finance bank in April 2017. AUSFB has a network of over 2,505 banking touchpoints across 21 states and 4 Union Territories. It has a customer base of over 1.15 crore and a workforce of more than 53,000 at end-June 2025.

Source: The Economic Times

Coal India permits sale of power under fuel supply pact in open market

In a key policy change, state-run Maharatna Coal India Ltd has approved the sale of un-requisitioned surplus (URS) power by thermal power plants (TPPs) using its linkage coal under long- and medium-term Fuel Supply Agreements (FSAs) in the open power market and exchanges, effective August 1, 2025. This move removes earlier restrictions which limited such power sales to only within the confines of power purchase agreements (PPAs). The company said the revision is in line with the spirit of the SHAKTI policy and applies uniformly to all existing and future long- and medium-term FSAs. It also covers Central and State gencos as well as independent power producers. "With the surplus power availability in the exchanges, ideally, the spot prices will be in check, leading to affordable power to all," said Coal India. The development is expected to benefit the power sector by facilitating smoother electricity supply and stabilising spot prices, especially during high-demand periods.

Source: CNBC TV18

Morning Wealth

Nifty Top 5 Gainers	Close	Pts. Chg	% Chg
HEROMOTOCO	4,660.7	185.8	4.2
TECHM	1,482.0	23.0	1.6
JSWSTEEL	1,064.8	12.2	1.2
WIPRO	242.3	2.4	1.0
ETERNAL	301.8	2.9	1.0

Nifty Top 5 Losers	Close	Pts. Chg	% Chg
ADANIENT	2,249.8	-50.5	-2.2
ADANIPTS	1,345.4	-21.7	-1.6
TRENT	5,303.5	-53.0	-1.0
TATAMOTORS	646.5	-6.4	-1.0
GRASIM	2,743.7	-22.1	-0.8

Int. Indices	Close	Pts. Chg	% Chg
S&P 500	6,340.0	-5.1	-0.1
Dow Jones	43,968.6	-224.5	-0.5
Nasdaq	21,242.7	73.3	0.3
FTSE 100	9,100.8	-63.5	-0.7
DAX	24,192.5	268.1	1.1
CAC 40	7,709.3	74.3	1.0
Nikkei 225	41,969.5	910.4	2.2
Hang Seng	24,895.5	-186.1	-0.7

ADR	Close	Pts. Chg	% Chg
HDFC Bank ADR	75.7	-0.2	-0.2
ICICI Bank ADR	32.8	-0.1	-0.4
Infosys ADR	16.0	-0.1	-0.3
Wipro ADR	2.7	0.0	0.8

Currencies	Close	Pts. Chg	% Chg
Dollar Index*	98.1	0.1	0.1
USD/INR	87.5	-0.2	-0.2
EURO/INR	102.0	-0.1	-0.1
USD/YEN*	147.3	-0.3	-0.2

Commodities	Close	Pts. Chg	% Chg
Gold (spot) Rs	1,01,446.0	184.0	0.2%
Silver (spot) Rs	1,14,215.0	560.0	0.5%
Crude (Brent) \$*	66.4	-0.1	-0.2%
Crude Oil (WTI) \$*	63.8	-0.1	-0.2%

*rates as at 8.30 am

Economy

RBI plans hefty penalty to make banks settle death claims fast

The Reserve Bank of India (RBI) has said banks must settle deposit accounts, safe deposit lockers and articles in safe custody of a deceased customer within 15 days of claim, proposing hefty penalties for non-compliance. In a draft circular, the central bank suggested banks pay the customer's kin the bank rate plus 4% per year interest for the period of delay on settling deposits, and ₹5,000 per day for delay in settlement of lockers. The bank rate currently is at 5.75%. These proposals are aimed at standardising the claims processes across the banking sector, maintaining uniformity and compensating the customer in case of inconvenience. The final guidelines are expected to be enforced by January 1, 2026. The draft circular said that if a nominee exists, the nominee would have to furnish a deceased customer's death certificate, claim form and a government ID card to access deposits. If no nominee exists, the customer will have to further provide a bond of indemnity signed by claimants, no objection from other legal heirs and a legal heir certificate or declaration by an independent person, the draft circular said. In case of a disputed will, documents of probate of will, letter of administration and succession certificate or court decree would be required. Banks can accept the will without any probate if the will is not disputed. For settlement of the locker, nominees should provide a death certificate and official identity proof. For a case without a nominee, one would require a claim form signed by legal heirs, death certificate, address proof, no objection from non-claimant legal heirs and legal heir certificate.

Source: Economic Times

International News

Japan Overall Bank Lending Climbs 3.2% On Year

The value of overall bank lending in Japan was up 3.2 percent on year in July, the Bank of Japan said on Friday - coming in at 644.396 trillion yen. That exceeded expectations for an increase of 2.7 percent, which would have been unchanged from the downwardly revised figure in June (originally 2.8 percent). Excluding trusts, lending rose an annual 3.5 percent to 566.007 trillion yen, while lending from trusts rose 1.3 percent to 78.388 billion yen. Lending from foreign banks jumped 21.1 percent on year to 5.672 billion yen.

Source : RTT News

Major Bulk Deal (NSE)

Scrip Name	Qty	Type	Client Name	Trade Price
NO MAJOR BULK DEALS				

Major Bulk Deal (BSE)

Scrip Name	Qty	Type	Client Name	Trade Price
NO MAJOR BULK DEALS				

Morning Wealth

EVENTS CALENDAR

Monday 04-Aug-2025	Tuesday 05-Aug-2025	Wednesday 06-Aug-2025	Thursday 07-Aug-2025	Friday 08-Aug-2025
Results– Shree Cement	Results– Gujarat Gas, Adani Ports, Bharti Airtel	Results– Bajaj Auto, Trent, Hero Motocorp	Results– Kalyan Jewellers, Titan	Results– Cholamandalam Financial Holdings, State Bank of India, Tata Motors
Economic —	Economic — S&P Global Services PMI (Jul)	Economic— RBI MPC Outcome	Economic —	Economic — S&P Global Manufacturing PMI (Jul)
Global– US Factory Orders (MoM) (Jun), JPY au Jibun Bank Services PMI (Jul), CNY Caixin Services PMI (Jul)	Global– US S&P Global Services PMI (Jul), US ISM Non-Manufacturing PMI and Prices (Jul)	Global– CNY Imports and Exports (YoY) (Jul), CNY Trade Balance (USD) (Jul)	Global– US Unit Labor Costs (QoQ) (Q2), US Consumer Credit (Jun), JPY Household Spending (Jun), JPY Adjusted Current Account (Jun)	Global–
11-Aug-2025	12-Aug-2025	13-Aug-2025	14-Aug-2025	15-Aug-2025
Results– Bata India	Results– Apollo Hospital, Hindalco	Results– Endurance Technologies Ltd.	Results–	Results–
Economic —	Economic — CPI (YoY) (Jul)	Economic—	Economic — WPI Inflation (YoY) (Jul)	Economic —
Global–	Global– US Core CPI (MoM) (Jul)	Global–	Global– Euro GDP (QoQ) (Q2), Japan GDP (QoQ) (Q2), US PPI (MoM) (Jul)	Global–
18-Aug-2025	19-Aug-2025	20-Aug-2025	21-Aug-2025	22-Aug-2025
Results–	Results–	Results–	Results–	Results–
Economic —	Economic —	Economic—	Economic —	Economic —
Global–	Global– CNY China Loan Prime Rate 5Y	Global– GBP CPI (YoY) (Jul), EUR CPI (MoM) (Jul)	Global– US Philadelphia Fed Manufacturing Index , US S&P Global Manufacturing PMI, US Existing Home Sales	Global–

(Source: Investing.com and BSE)

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