

Nifty Futures	Level 1	Level 2	Level 3
Resistance	24,670	24,850	25,000
Support	24,480	24,350	24,240

Indices (NSE)	Close	Pts. Chg	% Chg
Nifty 50	24,500.9	-211.2	-0.9
Nifty Future (August)	24,500.0	-231.0	-0.9
Nifty Future (Sept)	24,663.0	-193.0	-0.8
Nifty Bank	53,820.4	-630.1	-1.2
Nifty 100	25,078.5	-235.0	-0.9
Nifty 500	22,541.7	-227.0	-1.0
NIFTY MIDCAP 100	56,047.5	-718.7	-1.3

Indices (BSE)	Close	Pts. Chg	% Chg
SENSEX	80,080.6	-706.0	-0.9
BSE 100	25,638.2	-236.5	-0.9
BSE 200	11,087.6	-106.2	-1.0
BSE All Cap	10,349.4	-99.9	-1.0
BSE Midcap	44,826.2	-495.8	-1.1
BSE SmallCap	51,599.5	-498.1	-1.0

Sectoral Indices	Close	Pts. Chg	% Chg
Bankex	60,113.4	-581.7	-1.0
Capital Goods	65,274.2	-605.1	-0.9
Realty	6,855.7	-102.5	-1.5
Power	6,388.4	-77.3	-1.2
Oil & Gas	25,737.3	-126.6	-0.5
Metal	30,562.7	-220.4	-0.7
CD	60,432.4	361.9	0.6
Auto	56,433.0	-295.4	-0.5
TECK	17,111.9	-277.0	-1.6
IT	34,765.0	-592.5	-1.7
FMCG	20,426.3	-200.4	-1.0
Healthcare	43,694.1	-381.9	-0.9
India VIX	12.2	0.0	0.0

Exchange	Advance	Decline	Unchange
BSE	1,374	2,744	173
NSE	928	2,027	73

Volume	Current Rs (in cr)	% Chg
NSE Cash	102,774.0	-29.9
BSE Cash	7,516.3	-8.8
NSE F&O	400,794.0	-0.7

Net Inflows/Outflows (Rs in cr)	Buy	Sell	Net
FII	17,742.7	21,599.2	-3,856.5
DII	17,391.4	10,471.1	6,920.3

Intraday Nifty Outlook

The benchmark index slipped for the second straight session and closed at 24,500.90, giving up the 24,700–24,800 support zone and closing below the short-term moving averages. The index attempted to hold near the 24,774 mark but sellers dominated, leaving behind a bearish gap which is now filled and a clear rejection at higher levels. On the downside, the zone of 24,450–24,480 now becomes immediate support, while below this, the broader demand zone near 24,200–24,300 could get tested. Options positioning echoes a sell-on-rise setup: the heaviest Call OI is stacked at 24,800–25,000, while Put OI shifted down to 24,600 and 24,500, making 24,500 the intraday line in the sand. Unless the index closes back above 24,780, the bias remains soft with risk of a drift toward the lower demand band.

Corporate News

Hexaware and Replit Partner to Empower Secure Vibe Coding for the Enterprise

Hexaware Technologies, a global provider of IT services and solutions, today announced a strategic partnership with Replit, the leading agentic software creation platform, to revolutionize enterprise software development through secure, governed Vibe Coding. This collaboration merges Hexaware's digital innovation strengths with Replit's natural language-powered development platform, enabling business users and engineers alike to rapidly build secure, production-grade applications across the enterprise. As organizations strive to accelerate digital transformation, this partnership empowers teams beyond IT—including Product, Design, Sales, and Operations—to create internal tools and prototypes without relying on traditional coding skills. The synergy between Hexaware's Vibe Coding solutions and Replit's secure & agentic software creation platform dramatically reduces time-to-market and enhances customization for enterprise use cases.

Source : PR Newswire

Andhra Pradesh SIPB approves 30 investment projects worth Rs 53,922 crore

The 10th State Investment Promotion Board (SIPB) meeting of Andhra Pradesh on Thursday approved 30 projects with a combined investment of Rs 53,922 crore and the potential to create 83,437 jobs. Approved projects include HFCL to the tune of Rs 1,197 crore, Apollo Tyres with an investment of Rs 1,100 crore, Dhirubhai Ambani Green Tech Park at Rs 1,843 crore and Serentika Renewables of India Rs 2,000 crore. The HFCL investment is set to come up at Madakasira, Apollo Tyres (Chittoor district), Dhirubhai Ambani Green Tech park (Krishnapatnam) and Serentika Renewables of India (Anantapur). The Chief Minister emphasised his commitment to personally monitor the implementation and progress of projects at the ground level.

Source : Economic Times

Adani Power shares in focus as company receives LoA for 2,400 MW greenfield thermal power plant

Shares of Adani Power will be in focus on Friday, August 29, as the leading private sector thermal power generator said it has received a letter of award (LoA) for 25 years of long-term procurement of electricity from Bihar State Power Generation Company Ltd. (BSPGCL), which it will supply from a 2,400 MW (800 MW x 3) greenfield ultra-supercritical plant to be set up at Pirpainti in the Bhagalpur district of Bihar. BSPGCL awarded the LoA to APL on behalf of North Bihar Power Distribution Company Ltd. (NBPDC) and South Bihar Power Distribution Company Ltd. (SBPDCL), the two state utilities. This would be followed by the signing of the power supply agreement (PSA) between the entities. India's power demand is expected to grow rapidly in the coming years, with peak demand rising from the current nearly 250 GW to nearly 400 GW by 2031–32 and 700+ GW by 2047, propelled by rapid industrialisation, urbanisation, and a growing population.

Source : Upstox

Morning Wealth

Nifty Top 5 Gainers

	Close	Pts. Chg	% Chg
TITAN	3,637.7	43.7	1.2
LT	3,560.1	18.8	0.5
COALINDIA	374.3	1.9	0.5
HEROMOTOCO	5,091.7	18.3	0.4
ASIANPAINT	2,489.0	7.6	0.3

Nifty Top 5 Losers

	Close	Pts. Chg	% Chg
SHRIRAMFIN	571.7	-23.1	-3.9
HCLTECH	1,449.8	-43.0	-2.9
TCS	3,093.7	-63.5	-2.0
POWERGRID	274.5	-5.4	-2.0
INFY	1,500.1	-29.5	-1.9

Int. Indices

	Close	Pts. Chg	% Chg
S&P 500	6,501.9	20.5	0.3
Dow Jones	45,636.9	71.7	0.2
Nasdaq	21,705.2	115.0	0.5
FTSE 100	9,216.8	-38.7	-0.4
DAX	24,039.9	-6.3	0.0
CAC 40	7,762.6	18.7	0.2
Nikkei 225	42,694.5	-134.3	-0.3
Hang Seng	25,214.0	215.2	0.9

ADR

	Close	Pts. Chg	% Chg
HDFC Bank ADR	71.1	-1.2	-1.6
ICICI Bank ADR	31.7	-0.2	-0.7
Infosys ADR	17.0	-0.4	-2.1
Wipro ADR	2.8	0.0	-0.4

Currencies

	Close	Pts. Chg	% Chg
Dollar Index*	98.0	-0.1	-0.1
USD/INR	87.6	-0.2	-0.2
EURO/INR	102.2	0.4	0.4
USD/YEN*	146.9	-0.3	-0.2

Commodities

	Close	Pts. Chg	% Chg
Gold (spot) Rs	102,090.0	548.0	0.5%
Silver (spot) Rs	117,212.0	1,115.0	1.0%
Crude (Brent) \$*	68.1	-0.5	-0.8%
Crude Oil (WTI) \$*	64.1	-0.5	-0.8%

*rates as at 8.30 am

Economy

Industrial growth jumps to four-month high of 3.5%

Industrial growth jumped to a four-month high of 3.5% in July 2025, driven by a broad-based recovery in the manufacturing, electricity, capital, and consumer goods sectors. However, the Index of Industrial Production for July 2025, released by the Ministry of Statistics and Programme Implementation on Thursday, grew at a slower pace than the 5% growth seen in July last year. The manufacturing sector grew at a six-month high of 5.4% in July 2025, compared to 4.7% in July 2024. The electricity sector saw growth returning in July 2025 after two months of contraction. It grew 0.6% in July 2025, compared to 7.9% in July last year. The mining sector (-7.2%), however, continued to contract in July 2025, its fourth consecutive month of contraction. The capital goods sector grew by 5% in July 2025, on top of an already high base of 11.7% in July 2024. "Overall, the metals and machinery segments have done well, with basic metals, fabricated metals, and electric machinery registering double digit growth," Mr. Sabnavis noted. "Non-metallic mineral products too registered an impressive growth of 9.5%. This is a positive sign for investment taking place in the economy."

Source: The Hindu

International News

U.S. Pending Home Sales Fall More Than Expected In July

A report released by the National Association of Realtors on Thursday showed pending home sales in the U.S. fell by more than expected in the month of July. NAR said its pending home sales index decreased by 0.4 percent to 71.7 in July after sliding by 0.8 percent to 72.0 in June. Economists had expected pending home sales to edge down by 0.1 percent. The bigger than expected decline by pending home sales largely reflected weakness in the Midwest, where pending home sales plunged by 4.0 percent. Pending home sales also fell by 0.6 percent in the Northeast and slipped by 0.1 percent in the South, while pending home sales in the West surged by 3.7 percent. Despite another monthly decrease, NAR noted pending home sales in July were up by 0.7 percent compared to the same month a year ago.

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 25–Aug-2025	Tuesday 26–Aug-2025	Wednesday 27–Aug-2025	Thursday 28–Aug-2025	Friday 29–Aug-2025
Results—	Results—	Results—	Results—	Results—
Economic —	Economic —	Economic—	Economic —	Economic —
Global– US New Home Sales (Jul)	Global– US Durable Goods Orders (MoM) (Jul); US CB Consumer Confidence (Aug)	Global–	Global– US GDP (Q2)	Global– US Core PCE Price Index (Jul), US Chicago PMI (Aug)
01–Sep-2025 Results—	02–Sep-2025 Results—	03–Sep-2025 Results—	04–Sep-2025 Results—	05–Sep-2025 Results—
Economic —	Economic —	Economic—	Economic —	Economic —
Global– EUR Unemployment Rate (Jul)	Global– US S&P Global Manufacturing PMI (Aug), US ISM Manufacturing PMI & Prices (Aug)	Global– US JOLTS Job Openings (Jul)	Global– US Atlanta Fed GDPNow (Q3)	Global–
08–Sep-2025 Results—	09–Sep-2025 Results—	10–Sep-2025 Results—	11–Sep-2025 Results—	12–Sep-2025 Results—
Economic —	Economic —	Economic—	Economic —	Economic —
Global– US Consumer Credit (Jul)	Global– China CPI (YoY) (Aug)	Global– US PPI (MoM) (Aug)	Global– Euro ECB Interest Rate Decision (Sep), US Core CPI (MoM) (Aug)	Global– Japan Industrial Production (MoM) (Jul)

(Source: Investing.com and BSE)

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Disclaimer Appendix

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