

July 11, 2025

| Index | Up/Down | (%) | Points | Index Closing |
|------------------|---------|-------|---------|---------------|
| S&P BSE SENSEX | ↓ | -0.83 | -689.81 | 82,500.47 |
| NIFTY 50 | ↓ | -0.81 | -205.40 | 25,149.85 |
| S&P BSE MIDCAP | ↓ | -0.65 | -301.94 | 46,291.20 |
| S&P BSE SMALLCAP | ↓ | -0.70 | -383.93 | 54,484.76 |
| S&P BSE 500 | ↓ | -0.80 | -293.17 | 36,545.58 |

| Index | Open | High | Low | Close | 52 W High | 52 W Low |
|--------|-----------|-----------|-----------|-----------|-----------|-----------|
| SENSEX | 82,820.76 | 83,040.74 | 82,442.25 | 82,500.47 | 85,978.25 | 71,425.01 |
| NIFTY | 25,255.50 | 25,322.45 | 25,129.00 | 25,149.85 | 26,277.35 | 21,743.65 |

| | | | | | |
|----------------|----|---------------|----------|-----------------------|-----------|
| SENSEX Gainers | 9 | NIFTY Gainers | 12 | Sectors Posted Gain | 2 |
| SENSEX Losers | 21 | NIFTY Losers | 38 | Sectors Posted Loss | 22 |
| | | | | | |
| | | Advances | Declines | Advance/Decline Ratio | Unchanged |
| BSE | | 1503 | 2516 | 3:5 | 146 |
| NSE | | 1029 | 1891 | 5:9 | 92 |

| Top 5 SENSEX Drivers | | | | Top 5 Gainers & Losers (X – Sensex) | | | |
|----------------------|-----|---------------|------|-------------------------------------|------|-----------------|-------|
| Gainers | (%) | Losers | (%) | Gainers | (%) | Losers | (%) |
| HUL | 4.6 | TCS | -3.5 | Meta Infotech | 46.7 | JMJ Fintech | -46.1 |
| Axis Bank | 0.8 | M&M | -2.8 | Soma Textile | 20.0 | Shiva Granito E | -15.2 |
| Sun Pharma | 0.6 | Bharti Airtel | -2.2 | Looks Health | 20.0 | Gini Silk Mills | -10.0 |
| NTPC | 0.4 | Tata Motors | -2.0 | Fervent Synergi | 20.0 | Parsvnath | -10.0 |
| Eternal | 0.2 | Titan Company | -1.7 | Hemant Surgical | 20.0 | Frontier Cap | -10.0 |

| Top 5 NIFTY Drivers | | | | Top 5 Gainers & Losers (X – NIFTY) | | | |
|---------------------|-----|---------------|------|------------------------------------|------|-----------------|-------|
| Gainers | (%) | Losers | (%) | Gainers | (%) | Losers | (%) |
| HUL | 4.6 | TCS | -3.4 | Soma Textile | 20.0 | Parsvnath | -10.0 |
| SBI Life Insura | 1.4 | M&M | -2.8 | Forge Auto Intl | 20.0 | Jindal Worldwid | -8.0 |
| Axis Bank | 0.8 | Bajaj Auto | -2.6 | Maxposure | 20.0 | PC Jeweller | -7.4 |
| Kotak Mahindra | 0.8 | Wipro | -2.6 | Visaman Global | 20.0 | Peninsula Land | -7.0 |
| IndusInd Bank | 0.7 | Hero Motocorp | -2.4 | Tarmat | 14.8 | Zota Health Car | -6.9 |

| FII/FPI/DII trading activity across Indian Exchanges – CM (Rs. In Cr.) | | | | | | |
|--|-----------|-----------|------------|-----------|----------------|----------------|
| Category | Date | Buy Value | Sell Value | Net Value | MTD (FY 25-26) | YTD (FY 25-26) |
| FII/FPI | 11-Jul-25 | 11,998.56 | 17,102.78 | -5104.22 | -10,284.18 | 11,713.07 |
| DII | 11-Jul-25 | 15,728.51 | 12,169.88 | 3558.63 | 12,402.98 | 1,80,947.68 |



| Sectorial Contribution in SENSEX | | | | | | | |
|----------------------------------|------|------------------------|------|--------------------|------|-------------|------|
| Index | (%) | Index | (%) | Index | (%) | Index | (%) |
| FMCG | 0.5 | Oil & Gas | -1.3 | Industrials | -1.1 | Commodities | -0.5 |
| Healthcare | 0.2 | Energy | -1.2 | Consumer Durables | -0.9 | Power | -0.4 |
| TECk | -1.9 | Consumer Discretionary | -1.2 | Manufacturing | -0.6 | Metal | -0.3 |
| Focused IT | -1.8 | Telecom | -1.2 | Financial Services | -0.6 | Services | -0.3 |
| Auto | -1.7 | Capital Goods | -1.2 | PSU | -0.6 | Bankex | -0.3 |
| IT | -1.7 | Realty | -1.2 | Infrastructure | -0.5 | Utilities | -0.1 |

Glenmark Pharma soared 20%, hits 52-week high on cancer drug licensing deal:

Shares of Glenmark Pharma surged 20%, recording a 52-week high of ₹2,286.15 today, after the company's subsidiary firm, Ichnos Glenmark Innovation (IGI), inked an exclusive licensing agreement with AbbVie for the cancer drug, ISB 2001. As per the agreement, IGI and AbbVie received rights to develop, manufacture and commercialise ISB 2001 across North America, Europe, Japan and Greater China. Whereas, Glenmark Pharmaceuticals will hold the commercialisation rights in emerging Market regions, which include the rest of Asia, Latin America, Russia, the Middle East, Africa, Australia, New Zealand and South Korea. "Our collaboration with AbbVie and Glenmark reflects IGI's mission to accelerate access to transformative multispecifics™ for patients worldwide," Cyril Konto, managing director and CEO of IGI, said in a company release. "AbbVie's reach in major markets combined with Glenmark's commercial strength in Emerging Markets, creates complementary access pathways for ISB 2001, a trispecific T-cell engager with promising potential in Multiple Myeloma," he added.

Tata Elxsi share price tanked 7.5% on weak Q1 results:

Tata Elxsi share price was under pressure today, with the scrip falling up to 7.5% to an intraday low of ₹5,679 per share after reporting a weak set of results in Q1FY26. The company announced a net profit of ₹144.37 crore, a 22% Y-o-Y decrease from ₹184.08 crore in Q1FY25. Additionally, profit slipped sequentially from ₹172.42 crore recorded in Q4FY25. Operating revenue came in at ₹892.10 crore for Q1FY26, down both from ₹926.46 crore a year ago and from ₹908.34 crore in Q4 FY25. "For the first quarter of FY26, Tata Elxsi reported an operating revenue of Rs. 892.1 crores. Ebitda margins stood at 20.9% and PBT margin was reported at 21.1%. This quarter was challenging across key markets, with macroeconomic uncertainties, industry and customer specific issues impacting R&D spend and decision-making cycles across geographies.

Ireda share price slipped 6.2% as Q1 profit plunges 36% YoY:

Indian Renewable Energy Development Agency (Ireda) share price dropped 6.24% to hit an intraday low of ₹159.05 per share. Ireda shares declined today following a disappointing financial performance in Q1FY26. Ireda reported a 35.6% Y-o-Y drop in consolidated net profit, which fell to ₹246.88 crore in Q1FY26 from ₹383.70 crore in Q1FY25. Sequentially, net profit plunged over 50% from ₹501.79 crore reported in Q4FY25, signalling a sharp slowdown in earnings momentum. While revenue from operations rose 29% Y-o-Y to ₹1,947.60 crore, and grew 2.3% sequentially, rising costs weighed heavily on profits. Financing costs surged to ₹1,218 crore, up from ₹975 crore in the year-ago period, impacting margins and investor sentiment.

Enviro Infra's share price skyrocketed 15.8% in trade today:

Enviro Infra Engineers (Enviro Infra) share price was in demand today with the stock rising as much as 15.8% to hit an intraday high of ₹284 per share after the company announced its entry into the Zero Liquid Discharge (ZLD) segment. The rally followed an update that the firm secured a ₹400 crore project from the Maharashtra Industrial Development Corporation (MIDC), aimed at curbing pollution in the Panchganga River.

Sarda Energy & Mineral shares gain 5.7% as arm receives power procurement nod:

Shares of Sarda Energy and Minerals surged over 5.7%, logging an intraday high of ₹467 today, after the company's subsidiary firm, Chhattisgarh Hydro Power LLP, received an approval from the state power distribution company to procure power from the Rehar-1 small hydro power project. As per the exchange filing, Chhattisgarh Hydro Power LLP was granted an in-principle approval for procuring power from 3x 8.3 megawatt (MW) Rehar-1 small hydro power project on a long-term basis. "The company has received in-principle approval from Chhattisgarh State Power Distribution Company Ltd. for procuring power from 3x 8.3 MW Rehar-1 small hydro power project on a long term basis; and has commenced commercial operation of Rehar-1 small hydro power project," the exchange filing read.



| Index | CMP @ 07.45 pm | Points Up/Down | (%) Up/Down |
|-----------------|----------------|----------------|-------------|
| Gold | 3,366.30 | 40.60 | 1.22 |
| Silver | 38.51 | 1.205 | 3.23 |
| Brent Crude | 69.68 | 1.04 | 1.52 |
| WTI Nymex Crude | 67.65 | 1.08 | 1.62 |
| Natural Gas | 3.387 | 0.05 | 1.50 |

| Index | CMP @ 07.42 pm | Points Up/Down | (%) Up/Down |
|--------------------|----------------|----------------|-------------|
| Asia Pacific | | | |
| Shanghai Composite | 3,510.18 | 0.50 | 0.01 |
| GIFT NIFTY | 25,212.00 | 20.50 | 0.08 |
| Nikkei 225 | 39,569.68 | -76.68 | -0.19 |
| Hang Seng | 24,139.57 | 111.20 | 0.46 |
| Europe | | | |
| FTSE 100 | 8,929.85 | -45.81 | -0.51 |
| DAX | 24,263.98 | -192.83 | -0.79 |
| CAC | 7,833.39 | -68.86 | -0.87 |
| America | | | |
| Dow Jones | 44,413.19 | -237.45 | -0.53 |
| S&P 500 | 6,256.14 | -24.32 | -0.39 |
| Nasdaq Composite | 20,587.81 | -42.85 | -0.21 |

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Sunidhi Securities & Finance Ltd. – Research Analyst – INH000001329

Kalpataru Inspire, Unit.1, 8th floor, Opp. Grand Hyatt Hotel, Santacruz East, Mumbai-400055

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| Bombay Stock Exchange (BSE) | National Stock Exchange of India Ltd (NSE) | Metropolitan Stock Exchange of India Limited (MSEI) |
| Registration no. INZ000169235 | Registration no. INZ000169235 | Registration no. INZ000169235 |
| Compliance Officer Name: | Mr. Mahesh Desai | Phone No: 9122-66771777 |