

### CORPORATE AND ECONOMY NEWS

- **Britannia Industries Q1 FY25 Highlights (Consolidated, YoY):** Revenue rose 6% to Rs 4,250.3 crore. Ebitda rose 9% to Rs 753.66 crore. Margin stood at 17.7% versus 17.2% Net profit up 11% at Rs 505 crore.
- **Titan Q1 FY25 (Consolidated, YoY):** Revenue up 11.5% to Rs 13,266 crore. Ebitda up 11% to Rs 1,247 crore. Margin at 9.4% versus 9.5%. Net Profit down 5% to Rs 715 crore.
- **Delhivery Q1 FY 25 (Consolidated, QoQ):** Revenue up 5% at Rs 2,172 crore. Ebitda up 112% at Rs 97 crore. Ebitda margin at 4.5% versus 2.2% Net profit at Rs 54 crore versus loss of Rs 68 crore.
- **Medplus Health Services Q1 FY 25 (Consolidated, YoY):** Revenue up 15.96% at Rs 1489 crore. Ebitda up 32.76% at Rs 94 crore. Ebitda margin up 79 bps at 6.31%. Net profit up 257.5% at Rs 14.3 crore.
- **Archean Chemical Industries Q1 FY25 (Consolidated, YoY):** Revenue down 37.9% at Rs 213 crore. Ebitda down 47% at Rs 71 crore. Margin at 33.5% versus 39.2%. Net profit down 52.1% at Rs 45 crore.
- **Sheela Foam Q1 FY 25 (Consolidated, YoY):** Revenue up 26% at Rs 810 crore. Ebitda down 23% at Rs 60 crore. Ebitda margin at 7.4% versus 12.1%. Net profit up 9% at Rs 47 crore.
- **LIC Housing Finance Q1 FY25 (Standalone, YoY):** Total income up 0.5% at Rs 6,784 crore. Net profit down 1.8% at Rs 1,300 crore.
- **SJVN:** The Cabinet Committee on Economic Affairs has approved the investment of Rs 5,792.36 crore for the 669 MW Lower Arun Hydro Electric Project at a levelized tariff of Rs 4.99 per unit.
- **Mahindra & Mahindra Financial Services:** The company reported overall disbursement at Rs 4,530 crore, up 3% year-on-year, Business assets at Rs 1.07 lakh crore, up 22% year-on-year, and Collection efficiency at 95% for the month of July.
- **Samvardhana Motherson International:** The company will acquire Sojitz Corp's 34% stake in JV Motherson Auto Solutions for Rs 237 crore.
- **Power Grid Corporation Of India:** The company emerged as a successful bidder for an inter-state transmission line in Rajasthan.
- **HEG:** The board is to consider a stock split on August 13.
- **Power Mech Projects:** The company received an order worth Rs 142 crore for the revival of Phase II of Meenakshi Energy in Nellore district, Andhra Pradesh.
- **Gland Pharma:** USFDA conducted an unannounced inspection at the company's facility for Good Manufacturing Practices between July 25 and August 2 and concluded with three 483 observations.
- **Jyothy Labs:** Sanjay Agarwal resigned as CFO effective August 21.
- **Aptech:** Pawan Nawal was appointed as Group CFO effective August 2.
- **Mahindra & Mahindra:** The company subsidiary Classic Legends executed a JV agreement with Tube Investments of India in the ratio of 50:50 to use the BSA Marks in India for motorcycles, their parts, and accessories to be manufactured and sold by the subsidiary.

Source: Bloombergquint, Economic Times, Business Standard, Business Line, Times of India, Mint, Indian Express, Business Today, Indian Express, Money Control, in.investing, Cnbctv18.

### MARKET SCAN

#### INDIAN INDICES

Index	Clsq	Chg
BSE Sensex	80982	-1.08%
Nifty	24718	-1.17%
Banknifty	51350	-0.41%
Inida Vix	14.32	10.75%

#### GLOBAL INDICES

DJIA	39737	-1.51%
Nasdaq	16776	-2.43%
FTSE	8175	-1.31%
CAC	7252	-1.61%
DAX	17661	-2.33%
Nikkei	35910	-5.81%
Hang Seng	16946	-2.08%

#### SECTOR INDEX (NSE)

IT	39730	-2.41%
Infra	9379	-1.60%
Energy	44334	-1.38%
FMCG	61745	-0.69%
Pharma	21903	0.52%
Auto	25714	-2.92%
Metals	9315	-2.70%
Midcap	57914	-0.99%
Nifty 500	23259	-1.05%

#### DII/FII INVESTMENT (IN.CR.)

DII	2,966
FII/FPI	-3,310

#### Top Open Interest Gainers

Symbol	Curr	% Chg
CHAMBLFERT	27.06%	0.44%
CUMMINSIND	9.57%	-8.37%
ABCAPITAL	8.59%	-3.92%
UPL	8.45%	-4.31%

#### Top Open Interest Losers

GNFC	-10.77%	-3.71%
MARUTI	-9.44%	-3.93%
BSOFT	-9.36%	-5.72%
INDIAMART	-8.24%	-2.23%

#### FOREX MARKET

USDINR	83.30	0.03%
EURINR	89.21	0.11%

#### COMMODITY MARKET

Gold (\$/OZ)	2332.00	-0.43%
Silver(\$/OZ)	27.29	-0.27%
Brent (\$/Bbl)	88.31	-0.12%
Copper(\$/Lbs)	4.46	0.73%

Source: in.investing.com; As on 8:10 am IST

GLOBAL MARKETS

**Global Market Update**

US stocks sold off for a second straight session on Friday, and the Nasdaq Composite confirmed it was in correction territory after a soft jobs report stoked fears of an oncoming recession. The Dow Jones Industrial Average fell 610.71 points, or 1.51%, to 39,737.26, the S&P 500 lost 100.12 points, or 1.84%, to 5,346.56 and the Nasdaq Composite lost 417.98 points, or 2.43%, to 16,776.16..

**Crude Oil**

Oil prices hovered at eight-month lows on Monday as fears of a recession in the United States, the world's top oil consumer, offset concerns that escalating tensions in the Middle East may affect supplies from the largest producing region.

**Gift Nifty**

The GIFT Nifty is trading weak, indicating a gap-down start for the day. Nifty futures were trading at 24,373.5 at 07:00 am IST.

TECHNICAL CHART



TECHNICAL VIEW

**Nifty Outlook:**

Domestic benchmark indices, Sensex and Nifty 50, paused their five-day record run on Friday due to weak global cues. Technically speaking, on Thursday, both indices formed a spinning top candle. On Friday, they maintained below the spinning top candle's low, indicating weakness. As a result, in the short term, 25,080 and 82,130 will act as stiff resistance for Nifty and Sensex, respectively. On the downside, 24,000 will provide significant support for the Nifty, while 80,500-80,400 will act as support for the Sensex in the immediate term.

**Bank Nifty Outlook:**

The Bank Nifty index opened on a negative tone but witnessed buying interest at lower levels. However, due to strong selling pressure, the index settled on a negative note at 51,350. Technically, the index is still consolidating in the band of around 51,000-52,300. Thus, it is advised to wait for a decisive breakout / breakdown of this range, which will determine the further direction for the Bank Nifty.

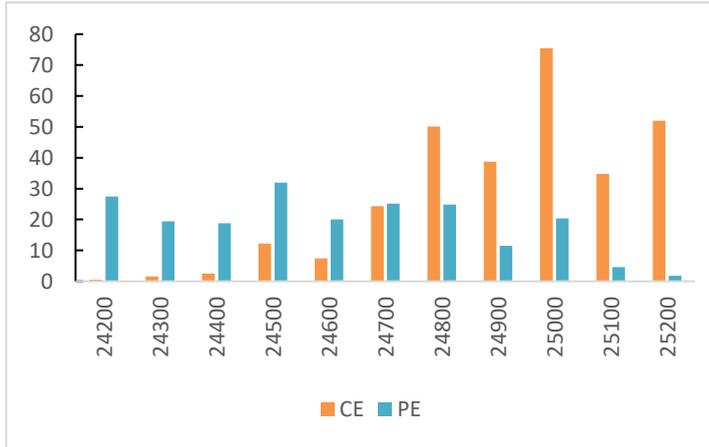
05-Aug-24

**DERIVATIVES INDICATORS**

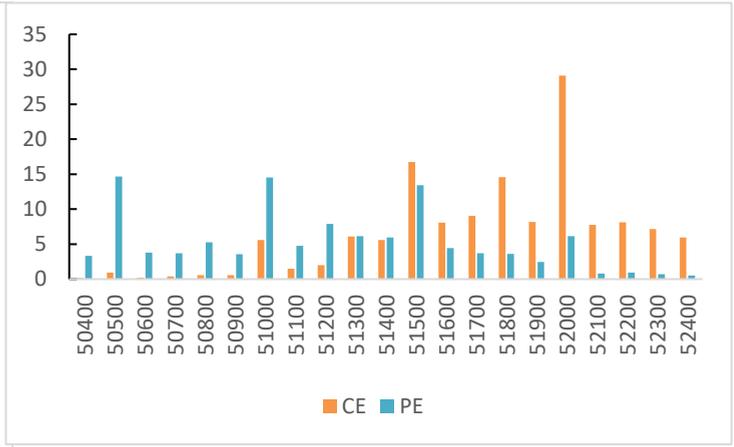
	Last Closing	Previous Day	Changes %	Out Come
NIFTY AUG FUT	24711.55	25032.25	-1.28%	Long Unwinding
NIFTY OI (Total)	16478375	16926400	-2.65%	
BANKNIFTY AUG FUT	51429.30	51753.40	-0.63%	Short Buildup
BANKNIFTY OI (Total)	2815425	2688660	4.71%	
NIFTY PCR - OI	0.91	1.29	-29.46%	Neutral
INDIA VIX	14.32	12.93	10.75%	High volatility

**WEEKLY OPTION'S OPEN INTEREST**

**Nifty Option OI - 08 Aug (OI in Lakhs)**



**BankNifty Option OI - 07 Aug (OI in Lakhs)**



**FII DERIVATIVES STATISTICS (In Cr.)**

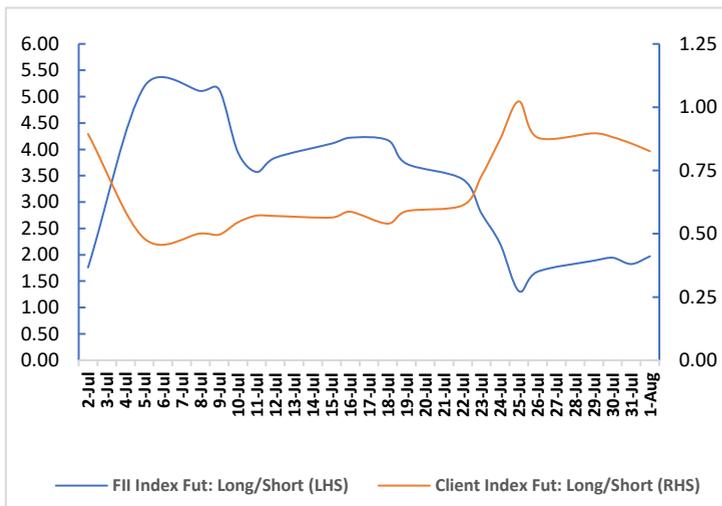
INDEX FUTURES	-1394.66
INDEX OPTIONS	32869.28
STOCK FUTURES	-8106.62
STOCK OPTIONS	-1572.34

**Securities in Ban For Trade Date 05-AUG-2024:**

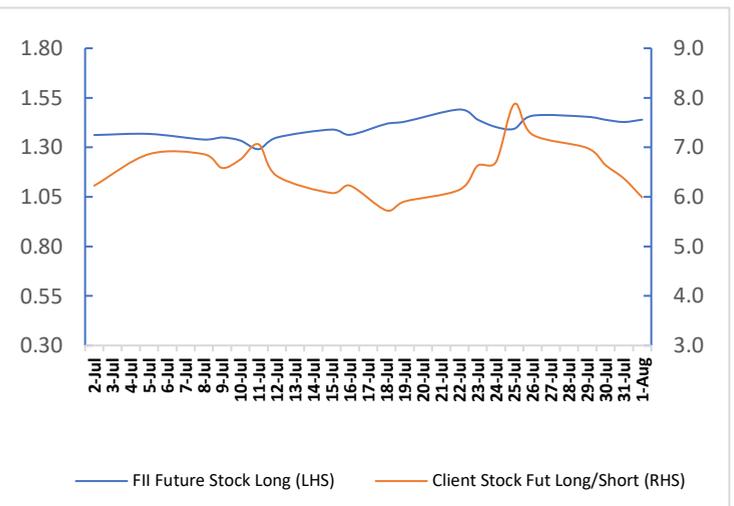
**ABCAPITAL BSOFT CHAMBLFERT GNFC GRANULES INDIACEM INDIAMART RBLBANK**

**Participant wise Open Interest (no. of contracts)**

**Fii's Vs Client Index Fut Long Short Ratio**



**Fii's Vs Client Stock Fut Long Short Ratio**



Retail Research Technical & Fundamental Calls for the Month of August-2024

Positional Calls (For 1-3 Months)

Date	Company	Rec	Rec Price	Stop Loss	Target	Status	Net Returns%
05-Mar	TRIDENT	Accu	38.94	34.64	47.64-51.64	Open	
25-Jun	HAPPSTMNDS	Accu	820-840	795	900-950	Open	
01-Jul	RELIANCE	Accu	3035-3115	2940	3300-3500	Open	
19-Jul	BAJAJFINSV	Accu	1598-1636	1560	1720-1800	Open	
25-Jul	NESTLEIND	Accu	2390-2470	2330	2650-2800	Open	
25-Jul	SCHAEFFLER	Accu	3825-4025	3600	4500-5000	Open	
26-Jul	LTF	Accu	170.5-176.5	164	195-205	Open	
26-Jul	RKFORGE	Accu	820-840	790	900-950	Booked	4.70%
26-Jun	CARBORUNIV	Accu	1690-1730	1645	1840-1940	Open	
30-Jul	LTTTS	Accu	5040-5170	4800	5540-5900	Open	
30-Jul	VBL	Accu	1540-1590	1495	1700-1800	Open	
30-Jul	IOC	Accu	172.5-182.5	167	195-210	Open	
01-Aug	TRENT	Accu	5625-5775	5400	6200-6500	Open	

Investment Idea (For Long Term)

Date	Company	Rec	Rec Price	Target	Status	Net Returns%
24-Nov	ADORWELD	Accu	1500-1520	1806	Open	
01-Jan	AIAENG	Accu	3650-3690	4909	Open	
03-Jan	TCI	Accu	825-835	1080	Open	
24-Jan	APLAPOLLO	Accu	1495-1505	2077	Open	
29-Jan	AUTOAXLES	Accu	2120-2130	2906	Open	
23-Feb	ASTRAL	Accu	2080-2100	2627	Open	
25-Apr	CAPLIPOINT	Accu	1320-1330	1675	Open	
02-Jul	TIMETECHNO	Accu	320-330	426	Open	
31-Jul	ALICON	Accu	1235-1265	1765	Open	

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