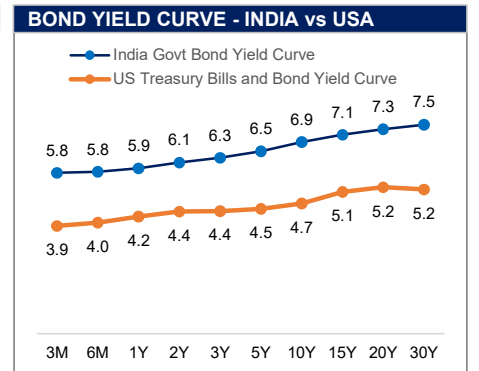
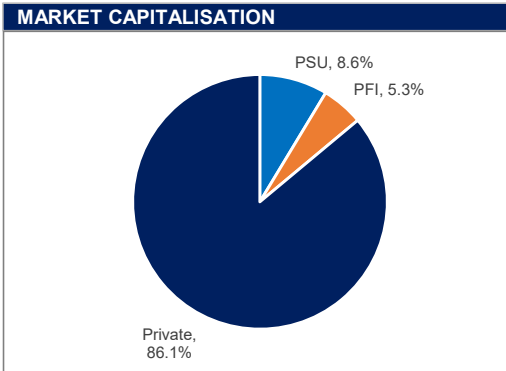
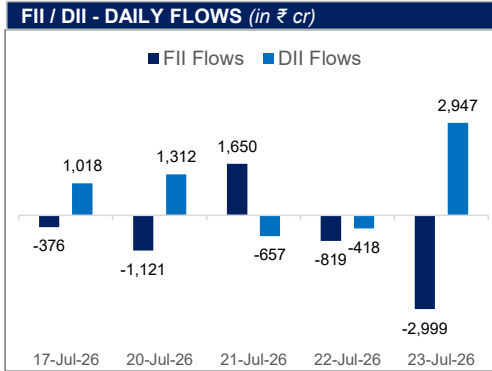




## MARKET MONITOR

| INDIAN INDICES      | CLOSE     | P.CLOSE   | CHANGE |
|---------------------|-----------|-----------|--------|
| NIFTY50             | 23,767.45 | 23,869.60 | -0.43% |
| BSE SENSEX          | 76,059.77 | 76,391.39 | -0.43% |
| NIFTY MIDCAP 150    | 22,685.25 | 22,705.25 | -0.09% |
| NIFTY SMALL CAP 250 | 17,601.20 | 17,651.25 | -0.28% |
| NIFTY AUTO          | 27,217.95 | 27,520.80 | -1.10% |
| NIFTY BANK          | 56,693.50 | 56,592.00 | 0.18%  |
| NIFTY FMCG          | 49,053.30 | 49,033.20 | 0.04%  |
| NIFTY HEALTHCARE    | 16,236.25 | 16,295.65 | -0.36% |
| NIFTY INFO-TECH     | 28,767.95 | 28,533.55 | 0.82%  |
| NIFTY DEFENCE       | 9,354.45  | 9,386.25  | -0.34% |
| NIFTY METAL         | 12,401.55 | 12,469.70 | -0.55% |
| NIFTY OIL AND GAS   | 11,077.00 | 11,128.50 | -0.46% |
| BSE PSU             | 20,615.16 | 20,628.62 | -0.07% |
| NIFTY PSE           | 9,952.30  | 9,978.45  | -0.26% |
| NIFTY 10Y G-SEC     | 2,663.65  | 2,669.03  | -0.20% |

| GLOBAL INDICES             | CLOSE     | P.CLOSE   | CHANGE |
|----------------------------|-----------|-----------|--------|
| USA MARKETS                |           |           |        |
| DOW JONES                  | 51,711.65 | 52,218.58 | -0.97% |
| S&P 500                    | 7,408.30  | 7,498.96  | -1.21% |
| NASDAQ                     | 28,454.81 | 28,998.10 | -1.87% |
| EUROPEAN MARKETS           |           |           |        |
| UK - FTSE100               | 10,674.55 | 10,639.17 | 0.33%  |
| FRANCE - CAC               | 8,330.59  | 8,299.09  | 0.38%  |
| GERMANY - DAX              | 24,966.60 | 24,763.12 | 0.82%  |
| ASIAN MARKETS              |           |           |        |
| JAPAN - NIKKEI 225         | 64,611.15 | 66,422.60 | -2.73% |
| CHINA - SHANGHAI COMPOSITE | 3,814.20  | 3,876.78  | -1.61% |
| HONG KONG - HANG SENG      | 24,963.23 | 25,210.81 | -0.98% |
| SINGAPORE - STRAITS TIMES  | 5,588.34  | 5,581.76  | 0.12%  |



|                                            |             |                                      |        |
|--------------------------------------------|-------------|--------------------------------------|--------|
| MACROS                                     |             |                                      |        |
| Real GDP Growth Rate - 2026-27 (Projected) | 6.60%       | Repo Rate                            | 5.25%  |
| CPI Inflation - 2026-27 (Projected)        | 5.10%       | India Government 10Y Bond Yield      | 6.83%  |
| Market Capitalisation (in ₹ cr)            | 4,76,60,986 | Spot Foreign Exchange Rate (INR/USD) | 96.57  |
| Investor Accounts (in cr)                  | 23.15       | Foreign Exchange Reserves (in \$ Bn) | 675.16 |

|                               |            |            |            |
|-------------------------------|------------|------------|------------|
| DERIVATIVES                   |            |            |            |
| Sensex Futures                | 30-07-2026 | 27-08-2026 | 24-09-2026 |
|                               | 76,269     | 76,527     | 77,162     |
| NIFTY50 Futures               | 28-07-2026 | 25-08-2026 | 29-09-2026 |
|                               | 23,830     | 23,890     | 24,025     |
| Brent Futures (\$ per barrel) | Aug-26     | Oct-26     | Jan-27     |
|                               | 98.16      | 88.40      | 82.46      |
| INR/USD Forward Rate          | 1 Month    | 3 Months   | 12 Months  |
|                               | 96.83      | 97.34      | 99.33      |

|                                                                                                                                                                                           |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| MARKET SIGNALS                                                                                                                                                                            |  |
| 1) The BSE Sensex ended 331.62 points, or 0.43%, lower at 76,059.77, while the Nifty 50 settled at 23,767.45, falling 102.15 points, or 0.43%.                                            |  |
| 2) DII bought equities worth ₹2,947 Cr. FII sold equities worth of ₹2,999 Cr on Thursday.                                                                                                 |  |
| 3) The HSBC Flash India Composite PMI Output Index fell to 54.3 in July from 57.1 in June, marking the weakest expansion in private sector activity since March 2022.                     |  |
| 4) India's auto parts industry to clock 10% annual growth on Semiconductor, Defence, EV push: Goldman Sachs                                                                               |  |
| 5) On MCX, August gold opened at ₹1,42,392, down ₹429 from the previous close of ₹1,42,821, while September silver opened at ₹2,18,280, down ₹1,095 from its previous close of ₹2,19,375. |  |