

02.09.2025

DAILY MARKET WRAP UP

SENSEX

INTRADAY CHART

TODAY SENSEX OPENED WITH AN UPSIDE GAP OF 155.6 POINTS AND AFTER MAINTAINING THE MOMENTUM THROUGHOUT THE DAY IT COLLAPSED IN THE LAST MARKET HOURS AND CLOSED DOWN BY 206.61 POINTS OR 0.26% SETTLED AT 80157.88.

BSE SENSEX

80,157.88 -206.61 -0.26%

02 Sep 25

Previous Close :80,364.49

Open :80,520.09

High :80,761.14

Low :80,008.50



INVESTMENTS

WEEKLY TECHNICALS:



SUPPORT

S: 80190

S1: 82100 (SHORT TERM) BROKEN

S2: 78540 (MID TERM) INTACT

S3: 75075 (LONG TERM) INTACT

S4: 72012 INTACT

RESISTANCE

R1: 82100

TODAY'S GAINERS.

TODAY'S GAINERS WERE POWER GRID, NTPC, TATA STEEL AND HUL.

TODAY'S LOSERS

THE LOSERS WERE M&M, ASIAN PAINTS, KOTAK BANK AND ICICI BANK.

NIFTY 50

INTRADAY CHART

TODAY NIFTY OPENED WITH AN UPSIDE GAP OF 27.95 POINTS AND DURING THE DAY IT TOO FOLLOWED THE SAME TREND AS OF SENSEX AND CLOSED DOWN BY 45.45 POINTS OR 0.18 % SETTLED AT 24579.60.

NIFTY 50 >

Updated: 02-Sep-2025

24,579.60

-45.45 (-0.18%)

● Open

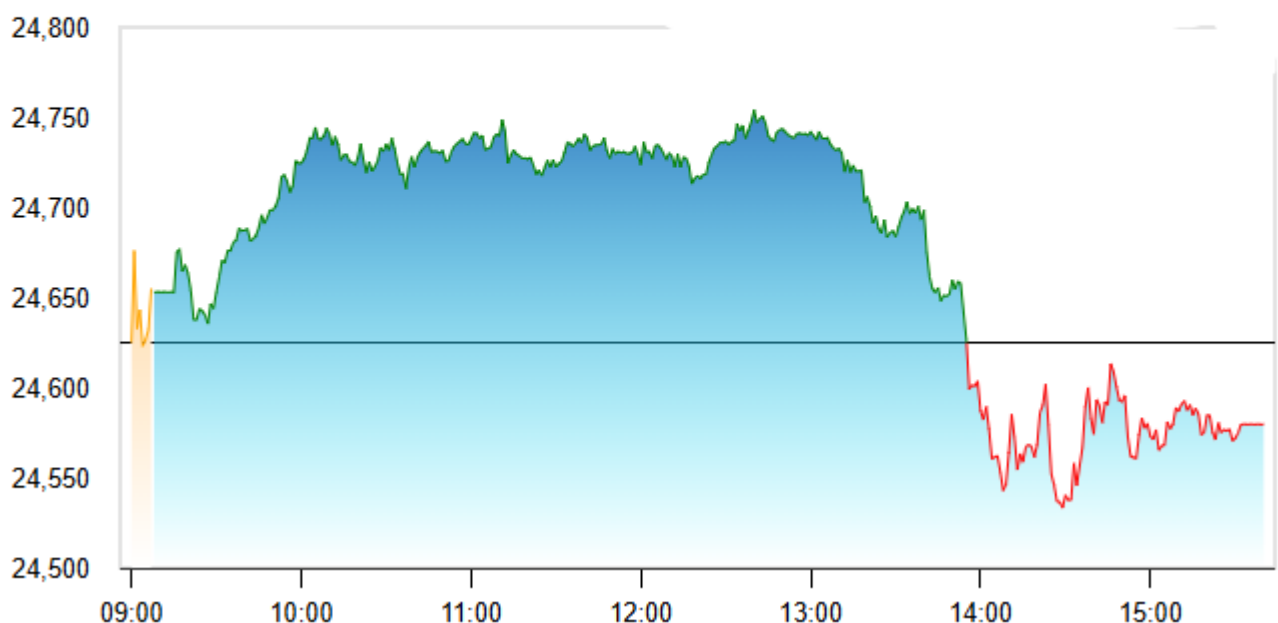
24,653.00

● High

24,756.10

● Low

24,522.35



WEEKLY TECHNICALS:



SUPPORT

S1: 24340 (SHORT TERM) BROKEN
S2: 23940 (MID TERM)
S3: 22790 (LONG TERM)
S4: 21883 INTACT

RESISTANCE

R1: 24340

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TODAY'S GAINERS
INVESTMENTS

TODAY'S GAINERS WERE TATA CONSUMER, NESTLE, POWER GRID AND NTPC.

TODAY'S LOSERS

TODAY'S LOSERS WERE DR REDDY, M&M, ICICI BANK AND ASIAN PAINTS.

MIDCAP INDEX

INTRADAY CHART

THE MID CAP INDEX OPENED WITH AN UPSIDE GAP OF 116.07 POINTS AND DURING THE INTIAL MARKET HOURS IT COLLAPSED TO LOWER LEVELS BUT LATER IT MADE A SHARP RECOVERY TO GIVE WAY TO DECLINE THOUGH MANAGED TO CLOSED UP BY 122.62 POINTS OR 0.27 % SETTLED AT 45496.28.

BSE MidCap

45,496.28 +122.62 +0.27%

02 Sep 2025

Previous Close :45,373.66

Open :45,489.73

High :45,675.90

Low :45,252.95



WEEKLY TECHNICALS:



SUPPORT

RESISTANCE

S1: 45270(SHORT TERM) BROKEN

R1: 47230

S2: 44105 (MID TERM) BROKEN

S3: 39450 (LONG TERM)

S4: 38050 INTACT

TODAY'S GAINERS,

TODAY'S GAINERS WERE MRF, RVNL, NMDC AND SUN TV.

TODAY'S LOSERS

THE LOSERS WERE TIINDIA, UPL, STAR HEALTH AND GODREJ IND.

SMALL CAP INDEX

INTRADAY CHART

THE SMALL CAP INDEX OPENED WITH AN UPSIDE GAP OF 163.8 POINTS AND DURING THE DAY IT ALSO FOLLOWED THE SAME TREND AS OF MID CAP INDEX AND CLOSED UP BY 336.10 POINTS OR 0.64% SETTLED AT 52552.74

BSE SmallCap

52,552.74 +336.10 +0.64%

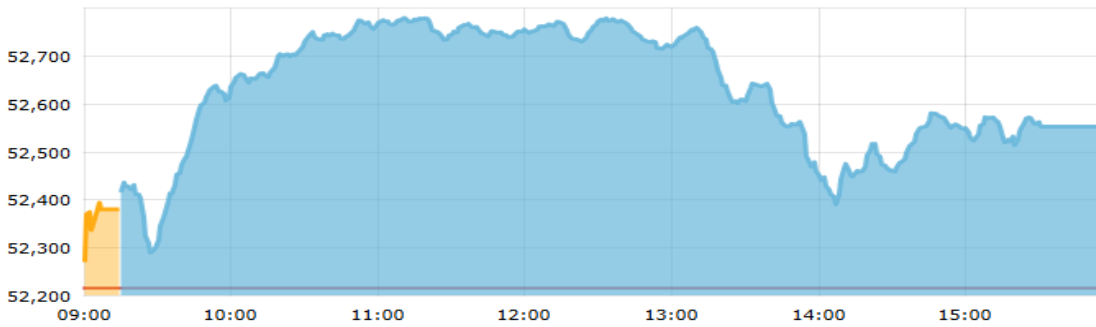
02 Sep 2025

Previous Close :52,216.64

Open :52,380.44

High :52,781.83

Low :52,243.90



WEEKLY TECHNICALS:

INVESTMENTS



SUPPORT

S1: 55495 (SHORT TERM) BROKEN

S2: 51920 (MID TERM) BROKEN

S3: 45945 (LONG TERM) (BROKEN)

S4: 43750

RESISTANCE

R1: 55495

TODAY'S GAINERS.

THE GAINERS WERE MOBIKWIK, VIMTA LABS, JAICORP AND RENUKA.

TODAY'S LOSERS

THE LOSERS WERE LUMAX TECH, PARADEEP, IXIGO AND GOPAL.

FII AND DII NET POSITION

01.09.2025:

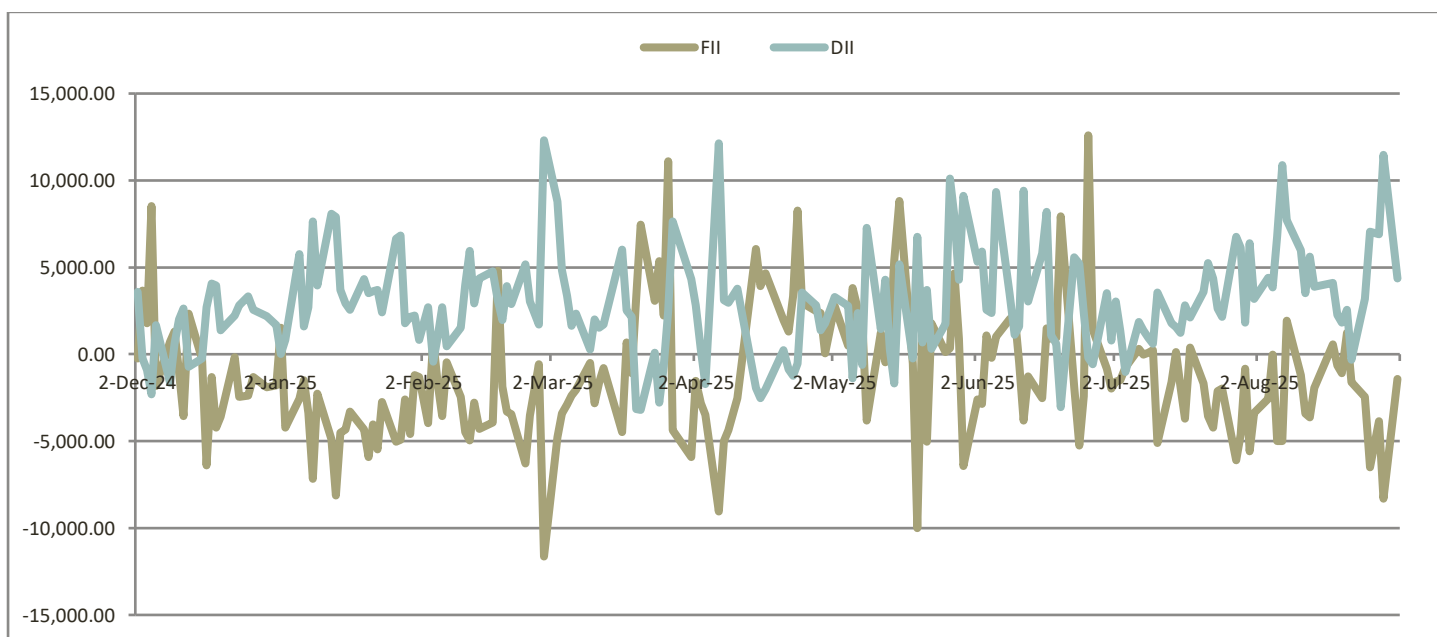
FII CASH MARKETS: 1429.71

SOLD 1429.71 CR IN NET POSITION

DII CASH MARKETS: 4344.93

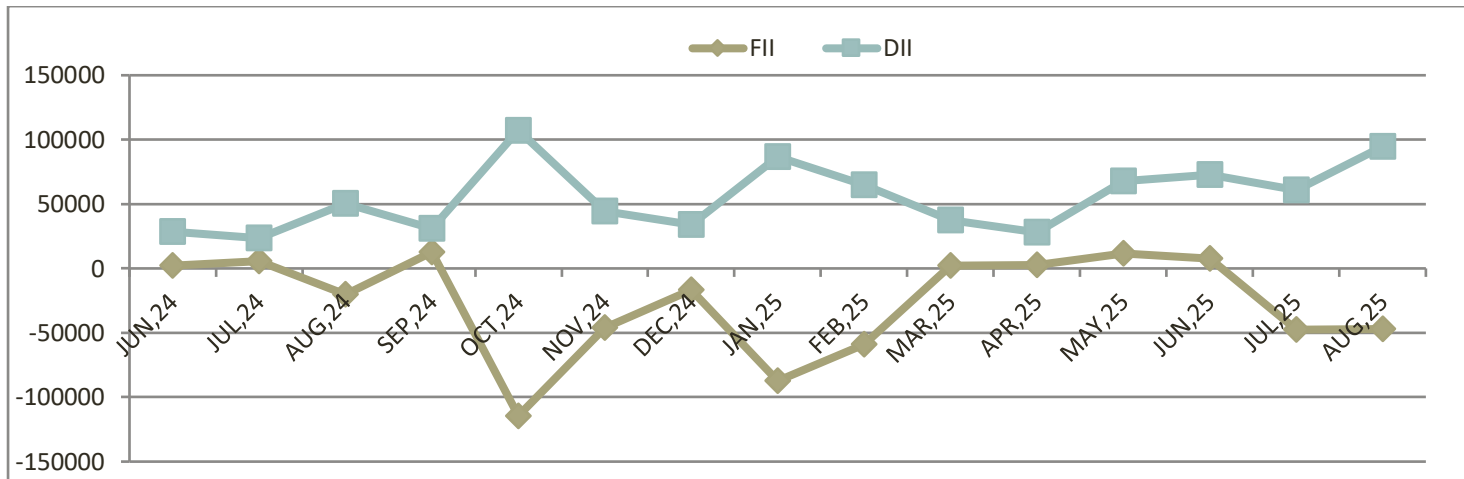
BOUGHT 4344.93 CR IN NET POSITION

DAILY POSITION FROM 02.12.2024 TO 01.09.2025



DURING THIS PERIOD FII SELLING WHICH VISIBLY SUBSIDED TILL MARCH AND RESUMED BUYING BUT SOLD INTO JULY AND CONTINUING WHEREAS DOMESTIC WHICH RESORTED TO INTERMITTENT BUYING AND SELLING INCREASED PURCHASES IN AUGUST RESULTING INTO MAINTAINING CONSOLIDATION IN THE MARKETS

MONTHLY POSITION



ON MONTHLY BASIS FII SELLING IS TRYING TO BE COUNTER BALANCED BY DII BUYING. FIIS AFTER SEVEN CONSECUTIVE MONTHS SINCE SEP 2024 THEY TURNED NET BUYERS DURING THE MONTH OF APR 2025. AND FOR THE MONTH OF JUNE BOTH FIIS AND DIIS TURNED NET BUYERS GIVING A FILIP TO THE UPSIDE OF THE MARKETS BUT IN JULY BOTH PUT PRESSURE ON THE MARKETS HOWEVER IN AUGUST DIIS HEAVY BUYING COUNTERBALANCED FFI SALES

VALUATIONS

INDEX	EPS 1 YEAR TTM	PRICE	P/E 1 YEAR TTM
SENSEX	3551.2	80157.88	22.6
NIFTY 50	1140.6	24579.60	21.6
BSE MID CAP	1358.5	45496.28	33.4
BSE SMALL CAP	1692.1	52552.74	30.9

SOURCE:TRENDLYNE.COM

GLOBAL INDICIES

GLOBAL INDICES ARE WEAK

US MARKETS AS ON 29.08.2025

	PRICE	CHANGE
DOW	45544.88	-92.02
NASDAQ	21455.55	-249.61

US MARKETS WERE CLOSED ON 01.09.2025 ON ACCOUNT OF LABOUR DAY

EUROPEAN MARKETS 02.09.2025 AT 03:30 PM

FTSE 100	9155.17	-41.17
DAX	23686.45	-350.88
CAC 40	7696.08	-11.82

ASIAN MARKETS 02.09.2025 AT CLOSE

NIKKEI 225	423210.49	+121.70
HANG SENG	25496.55	-120.87
KOSPI	3172.35	+29.42
TAIWAN SE	24016.78	-54.95
SHANGHAI COMPOSITE	3858.13	-17.40



INTRA DAY CHART

THE FUTURES OPENED FLAT BUT NOW TRADING LOWER.

E-mini Dow (\$5) Continuous Contract

\$45,412.00

↓ 0.41% -189.00 Today

Sep 2, 10:18:32 AM UTC · USD · CBOT · Disclaimer

1D 5D 1M 6M YTD 1Y 5Y MAX



GOLD

INTRA DAY CHART

GOLD OPENED HIGHER AND STILL TRADING HIGHER.

Gold Continuous Contract

\$3,551.90 ↑ 1.02% +35.80 Today

Sep 2, 10:18:47 AM UTC - USD - COMEX - Disclaimer



WEEKLY TECHNICALS:



THE CHART SHOWS GOLD PRICES ARE IN A CONSOLIDATION ZONE WITH UPWARD BIAS DUE TO UNCERTAINTIES CREATED BY WORLDWIDE TRADE TARIFF WARS AND BUYING BY CENTRAL BANKS.

DURING THE LAST FOUR MONTHS THE BUYING BY CENTRAL BANKS ACROSS THE GLOBE REACHED 1000 TONNES ANUALLY WHICH EARLIER USED TO BE ONLY 400 TO 500 TONNES ANNUALLY.

HOWEVER CHINA CENTRAL BANK BOUGHT ONLY 16-18 TONNES IN THE PAST FEW MONTHS. WHICH EARLIER HAS BEEN BUYING 200 TO 500 TONNES ANUALLY IT REMAINS TO BE SEEN WHETHER IT CAN SUSTAIN HEAVY BUYING GIVEN ITS CURRENT ECONOMIC TRAVAILS. (AS REPORTED IN BUSINESS STANDARD DATED 24.03.2025)

SUPPORT

S1: 3200 R1: 3400(BROKEN UPWARDS)

S2: 2950

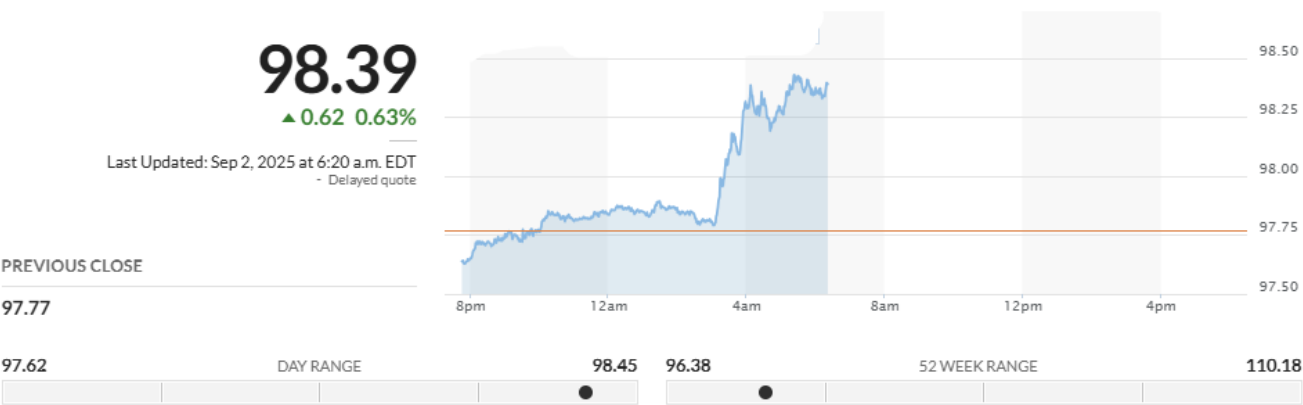
S3: 2800

DOLLAR INDEX

INTRA DAY CHART

DOLLAR INDEX OPENED LOWER BUT NOW TRADING HIGHER.

U.S. Dollar Index (DXY)



WEEKLY TECHNICALS:



THE DOLLAR INDEX IS HAS WEAKENED AS THE DEMAND FOR DOLLAR IS NOW DIMNISHING WHICH EARLIER HAS BEEN CONTINUOUSLY SURGING FOR IMPORT AND TRADE PURPOSES.

SECONDLY DUE TO DOLLAR DE-DOLLARISATION

RESISTANCE

R1: 99.30

R2: 104.85

R3: 109.50

CRUDE OIL

CRUDE OIL INDEX OPENED HIGHER AND STILL TRADING HIGHER.

INTRA DAY CHART

Crude Oil Continuous Contract

\$65.95 ↑ 3.03% +1.94 Today

Sep 2, 10:18:49 AM UTC · USD · NYMEX · Disclaimer

1D 5D 1M 6M YTD 1Y 5Y MAX



WEEKLY TECHNICALS:

INVESTMENTS



SUPPORT

S1: 66 (BROKEN)

RESISTENCE

R1: 85.30

R2: 93.58

MEDIUM TERM FACTORS:

- 1) FIRST OFFICIAL DATA HAS SHOWN THAT US GASOLINE AND DISTILLATES STOCK PILES GREW MORE THAN EXPECTED, REFLECTING WEAKER DEMAND IN THE WORLDS LARGEST ECONOMY.
- 2) SECOND ADDING TO THE WEAKNESS, SAUDI ARABIA THE WORLDS BIGGEST OIL EXPORTER, CUT ITS JULY PRICES FOR ASIAN CRUDE BUYERS TO NEARLY THE LOWEST IN TWO MONTHS.
- 3) THIRD THE PRICE CUT BY SAUDI ARABIA FOLLOWED THE OPEC+ MOVE OVER THE WEEKEND TO INCREASE OUTPUT BY 411000 BARRELS PER DAY FOR JULY.
- 4) SERVICE ACTIVITY IN CHINA- THE WORLD'S BIGGEST OIL IMPORTER EXPANDED AT ITS SLOWEST PACE IN NINE MONTHS IN JUNE AS DEMAND WEAKENED AND NEW EXPORT ORDERS DECLINED. **(SOURCE: ECONOMIC TIMES DATED 04.07.2025).**
- 5) A SURPRISE BUILD IN U.S. CRUDE INVENTORIES ALSO HIGHLIGHTED DEMAND CONCERNS IN THE WORLD'S BIGGEST CRUDE CONSUMER. **(SOURCE: ECONOMIC TIMES DATED 04.07.2025).**
- 6) OIL DEMAND WILL BE SHAPED BY TRADE NEGOTIATIONS BETWEEN THE US AND ITS TRADING PARTNERS **(SOURCE: ECONOMIC TIMES DATED 06.06.2025).**

EQUITY MARKET TRIGGERS

POSITIVE TRIGGERS

RESERVE BANK OF INDIA:

- 1) RATE CUT IN CRR BY 100 BPS ON JUNE 6 2025.
- 2) RATE CUT IN REPO BY 50 BASIS POINTS ON JUNE 6 2025.
- 3) 25 BASIS POINTS REDUCTION IN REPO RATE ON APRIL 9 2025.

ECONOMIC HIGHLIGHTS:

INVESTMENTS

PMI INDEX:

INDIA'S MANUFACTURING SECTOR EXPERIENCED SUBSTANTIAL GROWTH IN AUGUST, WITH THE PMI REACHING A 17.5-YEAR HIGH OF 59.3. THIS SURGE WAS FUELED BY HEIGHTENED PRODUCTION VOLUMES, DRIVEN BY IMPROVED SUPPLY-DEMAND COORDINATION AND ROBUST DOMESTIC DEMAND. **(SOURCE: THE TIMES OF INDIA, DATED 01.09.2025)**

GDP GROWTH

THE INDIAN GDP GROWTH FOR THE Q1 2025-2026 STOOD AT 7.8% DRIVEN BY SHARP RISE IN MANUFACTURING AND SERVICES WHICH IS BETTER THAN THE EXPECTATIONS OF 6.8% **(DATED 29.08.2025).**

MANUFACTURING AND CONSTRUCTION

GROWTH IN THE MANUFACTURING SECTOR QUICKENED TO 7.7% IN THE APRIL-JUNE 2025 QUARTER, COMING ON TOP OF A HIGH BASE OF 7.6% IN THE SAME QUARTER OF THE PREVIOUS YEAR. THIS WAS ALSO FASTER THAN THE 4.8% GROWTH THE SECTOR SAW IN THE JANUARY-MARCH 2025 QUARTER. THE CONSTRUCTION SECTOR GREW AT 7.6%, ON A HIGH BASE OF 10.1% IN Q1 OF LAST YEAR. THE ELECTRICITY, GAS, WATER SUPPLY AND OTHER UTILITY SERVICES

SECTOR, HOWEVER, SAW GROWTH SLOW DOWN SHARPLY TO 0.5%, FROM 10.2% IN THE SAME QUARTER OF THE PREVIOUS YEAR. **(SOURCE: THE HINDU DATED 29.08.2025)**

RATIONALISATION AND SIMPLIFICATION OF GST

INDIA IS POSIED TO OVERHAUL ITS GST STRUCTURE, REDUCING TAX SLABS FROM FOUR TO TWO. THIS REFORM AIMS TO LOWER RATES ON ESSENTIAL GOODS AND DURABLES, POTENTIALLY BOOSTING CONSUMPTION BY RS 0.7-1 LAKH CRORE. THE CHANGES, COUPLED WITH A POSSIBLE REPO RATE CUT, ARE EXPECTED TO STIMULATE DEMAND AND EASE INFLATIONARY PRESSURES, BENEFITTING VARIOUS SECTORS. **(SOURCE: BUSINESS STANDARD DATED 29.08.2025).**

RURAL DEMAND

UPSHOOTS IN RURAL DEMAND DUE TO KHARIF OUTPUT ON ACCOUNT OF GOOD RAINS AND SECONDLY INCREASE IN MSP. INFLATION RATE EASINESS IN FUTURE ON ACCOUNT OF GOOD RABI CROP AND ADEQUATE RESERVOIRS.

KHARIF SOWING

KHARIF SOWING HAS BEEN NEARLY 10% HIGHER THIS YEAR TILL JUNE 2025 FOLLOWING A GOOD RABI HARVEST SAYS PARAS JASRAI ASSOCIATE DIRECTOR INDIA RATINGS. **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**

RURAL WAGE

GROWTH IN RURAL WAGES IS DRIVING THE RURAL DEMAND THOUGH THE RURAL DEMAND IS STILL NOT BROADBASED BUT IS GAINING MOMENTUM. SAYS IDFC CHIEF ECONOMIST GAURAV SENGUPTA. **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**

INFORMAL SECTOR

THE INFORMAL SECTOR IS TAKING THE LEAD. STRONG INDIRECT TAX COLLECTION, MSME CREDIT AND WAGE GROWTH IN SMALL FIRMS HIGHLIGHT THE IMPROVEMENT IN THE INFORMAL SECTOR. AS A RESULT FIRST QUARTER OF 2025-26 COULD SEE A GROWTH OF 6.7 % SAYS HSBC GLOBAL RESEARCH ECONOMISTS **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**

GROWTH IN THE CONSTRUCTION SECTOR DURING THE FIRST QUARTER 25-26 WAS ALSO GOOD WHILE INFRASTRUCTURE AND CAPITAL GOODS ARE DOING WELL OWING TO AN UPTICK IN GOVT CAPEX. **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**

INPUT PRICES

INPUT PRICES HAVE BEEN STILL REMAINED BENIGNED. **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**

RETAIL INFLATION

RETAIL INFLATION AT 1.55% FOR JULY 25 VS 2.10% IN JUN 25 WHICH IS BELOW 3.1% TARGET RBI RATE. **(DATED 12.08.2025)**

THE INFLATION RATE IS EXPECTED TO BE 4.4 % IN FY26 FROM 4.7% EARLIER WHICH INDICATES COOLING DOWN IN INFLATION.

GENERAL CAPITAL EXPENDITURE

GENERAL CAPITAL EXPENDITURE HAS PICKED UP PACE DUE TO FRONT LOADING BY BOTH THE CENTRE AND THE STATES.SAYS IDFC CHIEF ECONOMIST GAURAV SENGUPTA. **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**

URBAN DEMAND

SLOWDOWN IN URBAN DEMAND DUE TO SLOW WAGE INCREASE AND INFLATIONARY PRESSURES NOW ABATING AND RATHER GREEN SHOOTS IN URBAN DEMAND ON ACCOUNT OF LOWER INPUT COSTS ARE VISIBLE.

MONSOON

AS OF LATE AUGUST, THE SEASONAL CUMULATIVE RAINFALL FOR THE PERIOD FROM JUNE 1 TO AUGUST 20 WAS SHOWING A 2% DEPARTURE FROM THE LPA. RECENT REPORTS ALSO SHOW SHARP INCREASES IN RAINFALL IN PARTS OF PUNJAB AND HARYANA IN LATE AUGUST, PROVIDING RELIEF TO FARMERS.

INTERNATIONAL HIGHLIGHTS:

- 1) US COMPANIES LOOKING TO RELOCATE THEIR MANUFACTURING FROM CHINA TO INDIA AS GLOBAL SUPPLY CHAINS REALIGNMENT ACROSS ELECTRONICS, TOYS AND PHARMACEUTICALS.
- 2) THE FIRST UK – US TRADE DEAL CONCLUDED POSITIVE AS THE DEAL CUTS DUTY TO 10 % FOR UK CARS.

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NEGATIVE TRIGGERS

INTERNATIONAL HIGHLIGHTS:

GLOBAL MERCHANDISE TRADE

WTO SHARPLY DOWNGRADING IT'S FORECAST FOR GLOBAL MERCHANDISE TRADE VOLUME IN 2025 TO 0.2 % CONTRACTION FROM ITS EARLIER GUIDANCE OF 2.75% GROWTH AFTER FACTORING IN THE 10% BASE LINE TARRIFS IMPOSED BY THE US.

CHINA'S GDP GROWTH

CHINA'S GDP GROWTH IS EXPECTED TO SLOW TO 3.8% IN 2025 FROM 4.5 % FORECASTED EARLIER BY MOODY'S RATINGS, WHILE US ECONOMIC GROWTH IS ANTICIPATED TO SLOW TO 1 % COMPARED TO 2 % PROJECTED IN THE FEBRUARY OUTLOOK. THE RATINGS AGENCY HAS CUT THE GLOBAL GROWTH FORECAST TO 1.9 % FOR 2025 FROM ITS PREVIOUS PROJECTION OF 2.5 %.(**SOURCE: ECONOMIC TIMES DATED 07.05.2025)**

US GROWTH

THE US GROWTH FORCAST HAS BEEN REVISED DOWNWARD TO 1.4 % IN 2025 FROM 2.3% PROJECTED IN THE JAN BY THE WORLD BANK **(SOURCE: ECONOMIC TIMES DATED: 11 JUNE 2025).**

DOMESTIC HIGHLIGHTS:

US TRADE TARRIFS

THE US GOVT HAD IMPOSED 50% TRADE TARRIFS ON INDIA (DATED 26.08.2025)

REAL GDP GROWTH

RBI HAD DECREASED THE REAL GDP GROWTH TARGET FROM 6.70 TO 6.50.

MONETARY POLICY

RBI HAD CHANGED IT MONETARY POLICY STANCE FROM 'ACCOMODATIVE TO 'NEUTRAL'.
(DATED 06.08.2025)

EARNINGS REVIEW Q1 2025-2026

INDIA INC'S FINANCIAL PERFORMANCE IN THE FIRST QUARTER OF 2025-26 (Q1FY26) WAS SUBPAR, WITH LOW SINGLE-DIGIT REVENUE GROWTH FOR THE NINTH CONSECUTIVE QUARTER AND PROFIT BEFORE TAX — EXCLUDING OTHER INCOME AND ONE-OFFS — DECLINING YEAR-ON-YEAR.

LEADING COMPANIES ACROSS KEY SECTORS SUCH AS BANKING, INFORMATION TECHNOLOGY SERVICES, AUTOMOTIVE, CONSUMER, CAPITAL GOODS, AND PHARMACEUTICAL STRUGGLED WITH WEAK SALES AND EARNINGS GROWTH.

AS A RESULT, MOST BROKERAGES HAVE LOWERED FORWARD EARNINGS ESTIMATES FOR FY26 AND FY27, BOTH AT THE MARKET LEVEL AND FOR INDIVIDUAL FIRMS.

FOR INSTANCE, KOTAK INSTITUTIONAL EQUITIES NOW EXPECTS FY26E AND FY27E NET PROFITS OF FIFTY 50 COMPANIES TO GROW 9.6 PER CENT AND 17.5 PER CENT RESPECTIVELY, COMPARED WITH EARLIER EXPECTATIONS OF 12.1 PER CENT AND 15.4 PER CENT AT THE START OF FY26.

(SOURCE BUSINESS STANDARD DATED 28.08.2025)

VALUATION

VALUATION CONCERNS IS NOW MODERATING. THERE IS LESS CAUTION IN THE AIR.

REQUIRED EARNINGS GROWTH (%) TO JUSTIFY EXISTING VALUATION (Calculations are based on analysis of 3- year forward P/E of various indices.)

INDEX	ESTIMATES GROWTH	REQUIRED GROWTH
NIFTY 50	10.4	14.4
NIFTY MIDCAP 100	17.4	28
NIFTY SMALL CAP 100	16.9	30.6
NIFTY 500	10.9	16

WORLD	14	18
US NASDAQ	19.9	26.1

(SOURCE: RBI'S FINANCIAL STABILITY REPORT FOR JUNE 2025)

PRIVATE CAPEX

NEW INVESTMENT PROJECTS FROM THE PRIVATE SECTOR SLIP TO RS 1.4 TRILLION IN FIRST QUARTER FY25-26, 81.35% LESS THAN 21.7 TRILLION RUPEES WORTH OF OUTLAYS IN THE PREVIOUS QUARTER SAYS CMIE.(SOURCE: BUSINESS STANDARD DATED JULY 3,2025). THIS MARKS A SHARP SLOWDOWN IN PRIVATE CAPEX.

INDUSTRIAL ACTIVITY

UNCERTAINTY DUE TO THE TARRIF WAR AND UNSEASONAL RAINFALL DAMPENED INDUSTRIAL ACTIVITY PARTICULARLY ELECTRICITY AND MINING; GROWTH IN THE MANUFACTURING SECTOR REMAINED SUBDUED IN FIRST QUARTER FY 25-26 AND EXPORTS HAVING FARED BADLY AFTER GOOD SHOWING IN APRIL DUE TO TARRIF WARS.

LONG TERM TRIGGERS

SHARE IN GLOBAL FUNDS:

INDIA'S SHARE IN GLOBAL FUNDS WILL RISE SHARPLY

INFLOW:

INFLOW OF 1.5 TRILLION DOLLAR ON A 5 TRILLION DOLLAR MARKET CAPTILISATION IS EXPECTED

DOMESTIC EQUITY EXPOSURE:

DOMESTIC EQUITY EXPOSURE COULD TREBLE FROM NEARLY 6% TO 15 % IN 10 TO 15 YEARS

DOUBLE CAPEX:

INDIA INC TO **DOUBLE CAPEX** TO 850 BN DOLLARS IN 5 YEARS SALES SMP REPORT. POWER AND TRANSMISSION, AIRLINE AND GREEN HYDROGEN SECTORS WOULD SPEAR HEAD THE SPENDING DRIVEN BY STRONG BALANCE SHEETS, ROBUST OPERATING CASH FLOWS AND FAVOURABLE GOVT POLICY. THE POWER AND TRANSMISSION SECTOR WOULD ACCOUNT FOR 300 BN DOLLARS IN NEW INVESTMENT. RE PROJECTS AND GRID INFRASTRUCTURE ARE EXPECTED TO DOMINATE AS INDIA PERSUES ITS 500 GW RENEWABLE CAPACITY TARGET BY 2030. (DATED: JUNE 10 2025 SOURCE: BUSINESS STANDARD)

SECTORAL INDICES

OUTPERFORMING SECTORS

THE OUTPERFORMING SECTORS INCLUDE TELECOM, CHEMICALS, PVT BANKING, PSU BANKS, DEFENCE AND FINANCIAL SERVICES.

UNDEPERFORMING SECTORS

THE UNDER PERFORMING SECTORS INCLUDE PHARMA AND HEALTHCARE, CPSE, ENERGY, REAL ESTATE AND METALS.

NEUTRAL SECTORS

THE NEUTRAL SECTORS INCLUDE AUTO, AUTOANCILLARY AND FMCG.

OUTLOOK

SECTOR OVERWEIGHTS: HEALTHCARE, CHEMICALS, TELECOM, FINANCIAL SERVICES, PVT BANKING, DISCRETIONARY CONSUMPTION AND TEXTILES

SECTOR UNDERWEIGHTS: PHARMA, CAPEX, INDUSTRIALS, METALS, IT AND CEMENT

SECTOR NEUTRAL/EQUAL WEIGHTS: AUTO, AUTO ANC,

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