



# WEEKLY WRAP-UP

07<sup>TH</sup> JULY - 11<sup>TH</sup> JULY 2025

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## HIGHLIGHTS OF THE WEEK

07 July 2025-11 July 2025

### DOMESTIC:

- Lodha records Rs4,450cr pre-sales in Q1, adds Rs22,700cr of new projects
- Adani to execute MHADA's largest-ever 142-acre redevelopment in Mumbai's Motilal Nagar
- Tata Steel ties up with InQuik to bring Modular Bridge Technology to India for faster bridge construction
- Future very strong and bright' as Indias consumption boosts travel: Tata Sons Chairman
- JSW Infra receives order to develop container berths at Kolkata port; to invest Rs740cr
- Jubilant FoodWorks sustains topline growth in Q1, but Turkey disappoints
- HCLSoftware launches sovereign AI to enhance government data privacy
- Tata Motors, M&M, three others may raise over Rs2k-cr PLI claims
- Nectar Lifesciences sells core API and formulation business for Rs1290cr
- Ola Electric rolls out software update to boost performance in EV market
- Hindustan Power commences work on 435MWp solar project in UP
- Puravankara bags redevelopment rights worth Rs21bn GDV in prime Mumbai suburb
- Bajel Projects to invest Rs1700mn to nearly triple galvanisation capacity by FY27
- Dixon Technologies forms JV with Signify to manufacture lighting products
- CAMS launches CAMSPay's payment gateway, supporting over 5,000 transactions per second
- Synergy Green gets wind turbine parts order from Adani Wind
- Adani Power completes Rs40bn acquisition of Vidarbha Industries Power
- Enviro Infra JV wins Rs3950mn pollution control project in Maharashtra
- Emcure Pharma's Ahmedabad facility clears USFDA inspection without observations
- Blue Dart launches Rakhi Express Campaign, offering up to 50% off for festive shipments
- Asian Paints sells entire 4.4% stake in Akzo Nobel India worth Rs7540mn
- Glenmark Pharma's unit, Abbvie sign global licensing deal for cancer drug
- Aegis Logistics transfers Pipavav LPG terminal to Aegis Vopak Terminals for Rs428cr
- Petronet LNG signs Rs1,200cr regasification deal with Deepak Fertilisers subsidiary
- Lemon Tree Hotels signs two new properties in Maharashtra
- Hexaware and Abluva join forces to deliver secure agentic AI solutions for the life sciences industry
- Mahindra, Uno Minda eye making rare earth magnets in India as China curbs bite
- EV maker Kinetic Green to expand business, launch three new e-scooters in next 18 months

### ECONOMY:

- India, US push deadline to strike trade pact to 31st July
- Trump warns BRICS, including India, of extra 10% tariff for trying to 'destroy' US dollars
- India-US trade deal: Indian delegation to visit US again for further talks

### INDUSTRY:

- India reaffirms its bioeconomy target of USD300bn by 2030
- US crude supplies to India surge 50% in H1 2025, inflows from Brazil up 80%
- Railways to adopt AI/ML for train maintenance

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### RE-INITIATING FUNDAMENTAL PICK:

#### Remsons Industries Ltd:

CMP-Rs130 | Target Price-Rs175 | Industry-Auto Components & Equip.

### COVERAGE NEWS:

**Shilpa Medicare Ltd:** (i) Shilpa Medicare Ltd's 100% subsidiary, Shilpa Pharma Lifesciences Ltd, unit-1 has successfully completed the GMP inspection conducted by the Brazilian regulatory authority, ANVISA from 30th June to 4th July, 2025. At the end of the inspection, no critical/major observations were reported, (ii) Shilpa Medicare's Unit VI facility, located at Dabaspur, Bengaluru, Karnataka, has received SFDA, Saudi Arabia, GMP certification. This follows the on-site inspection of the site from 18th-20th Feb'25; a full GMP inspection of entire facility with specific focus on Ondansetron oral film drug product. The inspection was closed with Zero observations.

**Texmaco Rail & Engineering Ltd:** The company has received an order of approx. Rs362mn by the Transportation Corporation of India Ltd to supply 2 rakes with a provision for further order of similar 8 rakes subject to performance and market conditions after delivery of initial 2 rakes.

**DCX Systems Ltd:** The company has been granted an industrial license (for 15 years) for (i) production, assembly and testing of radar systems and EW systems and (ii) integration and manufacturing of avionics & defence electronic equipment.

**Royal Orchid Hotels Ltd:** The company has launched a new property; Regenta Central Shivani in Solapur (with 65 keys).

**Advanced Enzyme Technologies Ltd:** The company has incorporated a WoS, Advanced Nutrazyme Private Limited with initial subscribed share capital of 50,000 equity shares at Rs10 each.

### The Week That Went By:

Nifty50 began the week on a flat note and remained rangebound for most of the time before violating its critical support level of 25,400 on the weekly expiry day. Disappointing earnings of heavyweight TCS dented the market sentiment further on the last day of the week, and selling in the Auto counters put additional pressure on the Index to end the week at 25,149.85 with a loss of 311.15 points. Barring FMCG, all the other sectors ended in red, with IT and Media being the major laggards. The heat of selling was seen in the Broader markets also as Mid and Smallcaps declined by 1.74% & 1.42%, respectively and underperformed the Benchmark Index.

Nifty50=25,149.85

Sensex30=82,500.47

Nifty Midcap 100=58,642.20

Nifty Smallcap100=18,763.45

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### NIFTY (WEEKLY)



### BANK NIFTY (WEEKLY)



### MARKET OUTLOOK

The Tariff related uncertainty aggravates, which caused the **Nifty50** to trade lower. So far, the level of 25,400 has acted as a strong support, which was breached during the week and now onwards, it will be considered as a resistance level. On the downside, the psychological level of 25,000 will be the key support, which coincides with 50DMA (24,955). Under the current condition, we believe that the Index will extend its corrective moves before potentially reversing from the mentioned support point. **BankNifty** is placed well as compared to Nifty50, with the immediate support at 56,630. A break below that could drag the Index lower to 56,250, whereas 57,200 is a nearby hurdle. For the past 8 weeks, the **Auto segment** has been oscillating in its well-maintained range. For a directional move, a breakout on either sides is essential. The same observation applies to the **Energy sector** also. The **FMCG segment** is moving in the **Symmetrical Triangle Formation**; a sharp uptick can be expected post the pattern breakout. With a disappointing start to the **IT** stock earnings, the sector has breached its consolidation on the downside and formed a big bearish candle, signaling continuation of the bearish sentiment. It appears that the **Pharma segment** has completed its pullback post the pattern breakout; however, the activities of the upcoming week will provide the confirmation. Both **Metal and PSU Banking segments** are hovering near their breakout point; one should keep an eye on them. As long as the dark cloud related to the tariff is not clear, volatility is here to stay.



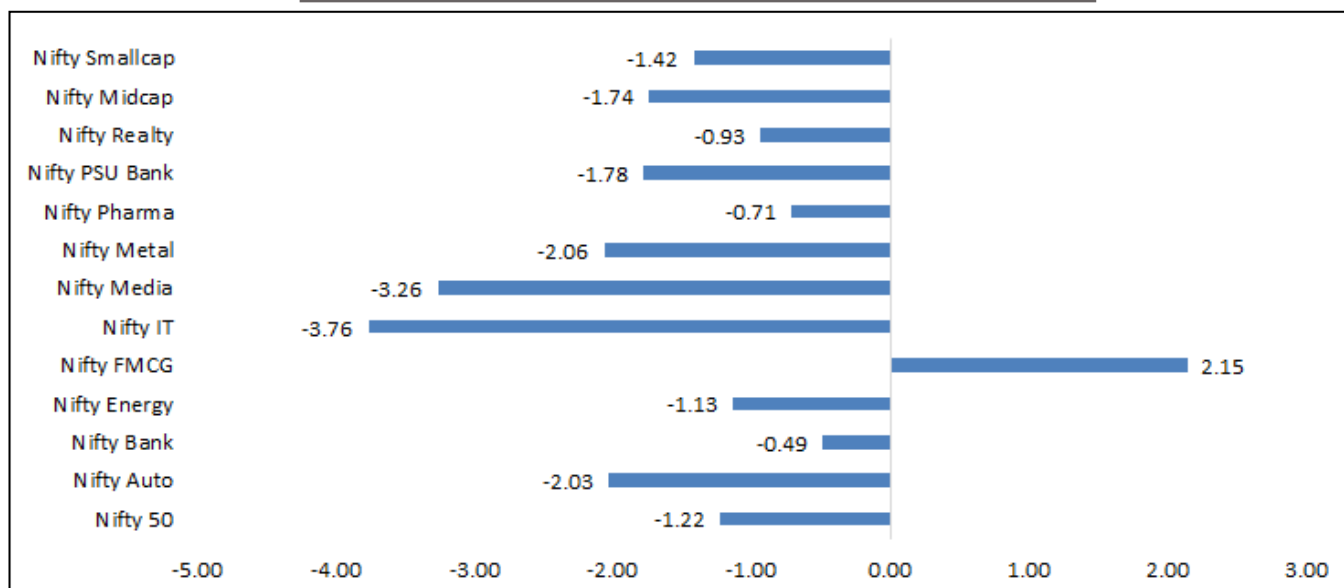
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### NIFTY 50 COMPONENTS (WEEKLY PERFORMANCE)

Adani Enterprises	(1.39%)	HDFC Life	(3.42%)	Reliance	(2.17%)
Adani Ports	0.20%	Hero Motocorp	(3.11%)	SBI Life	2.15%
Apollo Hospital	(4.64%)	Hindalco	(3.72%)	SBIN	(0.33%)
Asian Paints	0.45%	HUL	7.63%	ShriRam Finance	(1.77%)
Axis Bank	(0.31%)	ICICI Bank	(1.46%)	Sun Pharma	(0.10%)
Bajaj Auto	(4.22%)	IndusInd Bank	0.44%	Tata Consumer	(1.24%)
Bajaj Finserv	1.03%	INFY	(2.76%)	Tata Motors	(1.31%)
Bajaj Finance	0.76%	ITC	0.96%	Tata Steel	(1.91%)
BEL	(4.33%)	JioFin	0.12%	TCS	(4.55%)
Bharti Airtel	(4.59%)	JSW Steel	(0.12%)	Tech Mahindra	(3.43%)
Cipla	(1.72%)	Kotak Bank	4.04%	TITAN	(8.77%)
Coal India	(1.30%)	LT	(1.61%)	Trent	(2.52%)
Dr. Reddy's Labs	(4.20%)	M&M	(2.91%)	Ultratech	(0.09%)
Eicher Motors	(0.34%)	Maruti	(0.49%)	Wipro	(4.21%)
Eternal	0.73%	Nestle India	0.50%		
Grasim	(1.18%)	NTPC	1.98%		
HCL Tech	(5.37%)	ONGC	(1.43%)		
HDFC Bank	(0.49%)	PowerGrid	1.44%		

### SECTORAL PERFORMANCE



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### SECTORAL GAINER



The **FMCG sector** outperformed Nifty50 by ending the week with gains of 2.15%. Among the components, **Dabur (+8.08%)** and **HUL (+7.63%)** emerged as the best performers, followed by **GodrejCP (+7.53%)** and **Emami (+3.99%)**. On the flip side, **Colpal (2.92%)** was the major laggard. **United Spirits (1.56%)** and **Tata Consumer (1.24%)** also ended in red. As shown in the chart, the sector is moving in the **Symmetrical Triangle Formation**; a sharp uptick can be expected post the pattern breakout.

### SECTORAL LOSER



With a loss of 3.76%, the **IT segment** underperformed. All the constituents concluded the week in negative territory, with **Persistent (5.68%)** and **HCL Tech (5.37%)** being the major laggards, followed by **OFSS (5.11%)** and **TCS (4.55%)**. The sector has breached its consolidation on the downside and formed a big bearish candle, signaling continuation of the bearish sentiment.

## HIGHLIGHTS OF THE WEEK

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