



WEEKLY WRAP-UP

14TH JULY - 18TH JULY 2025

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HIGHLIGHTS OF THE WEEK

14 July 2025-18 July 2025

DOMESTIC:

- Tata Group Chairman performs ground breaking of 1.25 bn pound green steel project in UK
- Hero MotoCorp to enter European markets in Q2FY26, says Chairman Pawan Munjal
- Temasek building on India strategy with special focus on healthcare
- HCL Tech starts the year strong, but margins raise worry
- GAIL signs 10-year LNG supply deal with Vitol, extends pact with Oil India
- HUDCO declares Rs65,000cr through issuance of bonds, debentures
- Welspun Group subsidiary Christy targets 30% growth in FY26, India expansion plans delayed
- Ola Electric delays cell plant expansion, scales down capacity target to 5GWh
- VIP Ind promoters cut stake at discount in deal valued at Rs1,763cr
- Power Mech Projects bags Rs5510mn orders from SJVN Thermal and Jhabua Power
- IRB Infrastructure's Palsit Dankuni project receives completion certificate
- RVNL wins Rs4474mn Delhi Metro Phase-IV viaduct and station platforms contract
- Ahluwalia Contracts bags work order worth Rs20.89bn from DLF
- Dixon Technologies to pick 51% stake in Q Tech India
- Zydus Lifesciences gets USFDA nod for its painkiller Celecoxib capsules
- Bajaj Finserv gains IRDAI approval for Allianz stake acquisition
- Hindustan Zinc bags potash block in Rajasthan
- Tech Mahindra starts the fiscal with caution and mixed signals
- Reliance Power approves Rs6,000cr equity raise, Rs3,000cr NCD issue
- NTPC gets CCEA nod to invest Rs20,000cr in green energy
- Godrej Properties enters Raipur with 50-acre residential land acquisition
- Emcure Pharma to distribute Sanofi's oral anti-diabetic drugs across India
- SBI likely to launch Rs250bn QIP; LIC may invest Rs70bn
- Adani Group to exit Wilmar JV, inks Rs71.5bn deal to sell 20% stake
- Lupin receives 4 observations at its Pithampur unit-2 manufacturing facility
- HDFC Life aims to expand and focus on tech amid macro-opportunities in FY26
- Sunteck Realty April-June pre-sales rise 31% to Rs657cr
- HUL's Surf Excel liquid detergent eyes premium laundry segment with new product

ECONOMY:

- Tariff tweaks: India to gain in over half of exports to US
- CPI inflation eases to six-year low of 2.10% in June on favourable base effect, decline in food prices
- RBI reviewing bank ownership rules, may allow foreign lenders to hold 26% stake

INDUSTRY:

- India achieves 50% non-fossil fuel power generation capacity 5 years ahead of 2030 target
- Tirupur's garment exports increase 12% in Q1FY26 to Rs12,193cr
- Auto fuel prices may be cut if crude remains at current levels: Hardeep Singh Puri

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COVERAGE NEWS:

Container Corporation of India Ltd: The company has signed an MoU with M/s Rais Hassan Saadi Group (RHS), Dubai to explore collaborative opportunities in the overseas shipping and logistics sector to enhance international multimodal connectivity.

Sterlite Technologies Ltd: The company has entered into a collaboration with Hygenco for Maharashtra's first green hydrogen and green oxygen production facility for optical fibre.

EMS Ltd: (i) The company has received a letter of award (worth Rs194.61mn) from Deltabulk Shipping India Pvt. Ltd for electrical works under project development, operation and maintenance of the Multimodal Logistics Park (MMLP) at Nagpur, (ii) In continuation to the earlier intimation of receipt of L1 status for the tender awarded by UP Jal Nigam, EMS has now received a LoA for this tender. The order value (excluding GST) is approx. Rs987.9mn executable over a period of 21 months.

Indegene Ltd: The company has launched NEXT medical writing automation, an advanced platform that combines deep medical writing expertise with Gen-AI to accelerate the creation of high-quality, compliant documents across clinical development, regulatory submissions and beyond.

Gland Pharma Ltd: The company has received a GMP certificate from Danish Medicines Agency in connection with marketing authorizations listing manufacturers located outside of the European Economic Area, for aseptically prepared powder for injection, infusion and inhalation.

Sun Pharmaceutical Industries Ltd: (i) After the litigation settlement with Incyte Corporation, Sun Pharma together with its subsidiaries has announced the launch of Leqselvi (deuruxolitinib) 8mg tablets in the US markets, (ii) The company has incorporated a subsidiary Sun Pharma (Hainan) Company Ltd in China which will do localization of products to be produced for prospective partners in China for local sales.

Patel Engineering Ltd: The Bombay High Court has dismissed the company's appeal against Acron Developers Pvt. Ltd (for a project at Neotown Bangalore) for an arbitral award worth Rs265mn plus 18% interest alongwith arbitral costs worth Rs38.2mn.

Thirumalai Chemicals Ltd: TCL Specialties LLC, USA (WoS of TCL) anticipates the maleic anhydride, malic acid and fumaric acid plant in the US to be completed by Oct/Dec'25 with production and sale ramp-up expected during CY26.

Shilpa Medicare Ltd: The company's Unit VI, Dabaspur, Bengaluru, has received an EIR with a VAI (Voluntary Action Indicated) classification from the USFDA for the GMP inspection conducted from 24th-30th Oct'24.

The Week That Went By:

After spending most of the time in a tight range, the Index breached its consolidation on the last day of the week on the downside and eventually settled the week at 24,968.40 with a loss of 181.45 points. Media and Realty were the top performers among the sectors, whereas the IT space extended its underperformance. Mid and Smallcaps advanced by 0.79% & 1.05% and outperformed the Frontline Index.

Nifty50=24,968.40

Sensex30=81,757.73

Nifty Midcap 100=59,104.50

Nifty Smallcap100=18,959.65

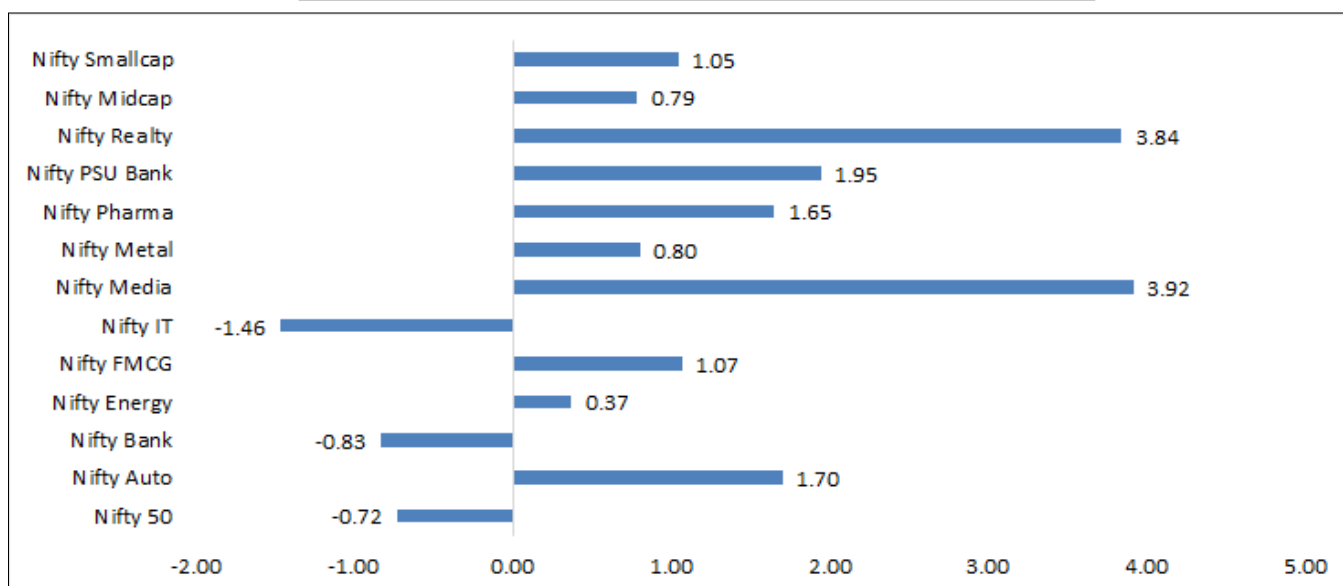
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NIFTY 50 COMPONENTS (WEEKLY PERFORMANCE)

Adani Enterprises	1.22%	HDFC Life	(2.55%)	Reliance	(1.27%)
Adani Ports	0.97%	Hero Motocorp	4.71%	SBI Life	(2.60%)
Apollo Hospital	1.53%	Hindalco	0.68%	SBIN	1.78%
Asian Paints	(2.42%)	HUL	(1.27%)	ShriRam Finance	(3.28%)
Axis Bank	(6.22%)	ICICI Bank	0.33%	Sun Pharma	1.20%
Bajaj Auto	3.28%	IndusInd Bank	1.83%	Tata Consumer	2.04%
Bajaj Finserv	0.72%	INFY	(0.40%)	Tata Motors	0.21%
Bajaj Finance	0.91%	ITC	1.28%	Tata Steel	1.57%
BEL	(3.52%)	JioFin	(2.77%)	TCS	(2.29%)
Bharti Airtel	(1.23%)	JSW Steel	0.58%	Tech Mahindra	(3.02%)
Cipla	(0.24%)	Kotak Bank	(3.79%)	TITAN	1.10%
Coal India	1.97%	LT	(1.93%)	Trent	0.35%
Dr. Reddy's Labs	0.26%	M&M	4.21%	Ultratech	0.03%
Eicher Motors	0.25%	Maruti	(1.28%)	Wipro	3.20%
Eternal	(2.05%)	Nestle India	2.83%		
Grasim	(1.57%)	NTPC	(0.12%)		
HCL Tech	(5.16%)	ONGC	1.84%		
HDFC Bank	(1.36%)	PowerGrid	(1.69%)		

SECTORAL PERFORMANCE



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SECTORAL GAINER



With gains of 3.92%, the **Media sector** outperformed the Frontline Index. Except for **Tips Music (2.89%)**, all the other components ended the week in green, with **Network18 (+11.33%)** and **Nazara (+7.09%)** being the top performers.

SECTORAL LOSER



The **IT sector** ended the week with a loss of 1.46% and underperformed. Barring **Wipro (+3.20%)** and **OFSS (+1.71%)**, all the constituents settled the week in negative territory, where **HCL Tech (5.16%)** and **Tech Mahindra (3.02%)** were the major laggards.

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