

**Pre-Session: GIFT Nifty suggests a muted start; Asian markets lower!!**

- Indian benchmark indices, Sensex and Nifty, are expected to open on a flat to slightly negative note today, tracking muted cues from GIFT Nifty, which was hovering around 25,537.50 earlier this morning. Investor sentiment may remain cautious as global markets react to updates on US trade policy. US Treasury Secretary Scott Bessent announced that tariffs will be imposed from August 1 on countries that haven't reached an agreement with the Trump administration. Back home, focus will shift to the April-June quarter (Q1FY26) earnings season, which kicks off this week. Tata Consultancy Services (TCS) will lead with its results on July 10, followed by DMart on July 11, HCL Tech on July 14, and Tech Mahindra on July 16.
- On Friday, the 30-share benchmark index ended at 83432.89 up by 193.42 points or by 0.23 % and then NSE Nifty was at 25461 up by 55.7 points or by 0.22 %.
- On the global front, Markets in the Asia Pacific region are trading lower amid shifting of the deadline to impose US tariffs. Japan's benchmark Nikkei 225 slipped 0.26 per cent, while South Korea's Kospi fell 0.48 per cent. Australia's S&P/ASX 200 was flat at the open. US stock futures, meanwhile, were also trading lower fell with Dow Jones Industrial Average futures down 146 points (0.32 per cent), S&P 500 futures 0.39 per cent, and Nasdaq 100 futures 0.42 per cent. Back home, Top traded Volumes on NSE Nifty – Tata Steel Ltd. 22938753.00, Bharat Electronics Ltd. 16618426.00, Power Grid Corporation of India Ltd. 14193884.00, Eternal Ltd. 13076740.00, Bajaj Finance Ltd. 10613046.00,
- On NSE Future and Options, total number of contracts traded in index futures was 98399 with a total turnover of Rs. 19036.32 Crore. Along with this total number of contracts traded in stock futures were 974049 with a total turnover of Rs. 69111.79 Crore. Total numbers of contracts for index options were 51613533 with a total turnover of Rs. 9893410.18 Crore. and total numbers of contracts for stock options were 4466325 with a total turnover of Rs. 331618.99 Crore.
- The FII's on 04/07/2025 stood as net buyer in equity and debt. Gross equity purchased stood at Rs. 10833.45 Crore and gross debt purchased stood at Rs. 745.80 Crore, while the gross equity sold stood at Rs. 13442.02 Crore and gross debt sold stood at Rs. 654.20 Crore. Therefore, the net investment of equity and debt reported were Rs. -2608.57 Crore and Rs. 91.60

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