

## Market Snapshot

KEY INDICES	19-Jun-26	12-Jun-26	05-Sep-25
S&P CNX NIFTY	24013.10	23622.90	<b>1.65</b>
SENSEX	76802.90	75527.95	<b>1.69</b>
NIFTY MIDCAP 100	62517.30	60768.10	<b>2.88</b>
NIFTY SMLCAP 100	18784.45	18197.45	<b>3.23</b>

(Source: Capitaline, [Investing.com](https://www.investing.com))

## Sectoral Snapshot

KEY INDICES	19-Jun-26	12-Jun-26	%Ch
NIFTY BANK	57685.75	56814.80	<b>1.53</b>
NIFTY AUTO	26583.35	26293.85	<b>1.10</b>
NIFTY FMCG	49558.70	48827.60	<b>1.50</b>
NIFTY IT	27426.85	27795.75	<b>-1.33</b>
NIFTY METAL	13020.80	12854.50	<b>1.29</b>
NIFTY PHARMA	24460.30	24380.05	<b>0.33</b>
NIFTY REALTY	811.90	769.60	<b>5.50</b>
BSE CG	83600.96	78891.93	<b>5.97</b>
BSE CD	61066.86	58426.47	<b>4.52</b>
BSE Oil & GAS	26478.50	26151.06	<b>1.25</b>
BSE POWER	8289.27	7920.40	<b>4.66</b>

(Source: [Investing.com](https://www.investing.com))

## FII & DII Activities (Rs Crore)

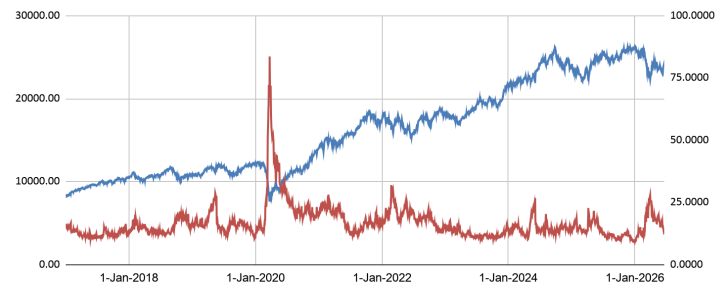
12/06/2026 to 19/06/2026

Activities	FIIs	DIIIs
Buy	88793.73	104306.83
Sell	87557.16	91857.65
Net	<b>1236.57</b>	<b>12449.18</b>

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



(Source: [NSE](https://www.nse.com))

## Benchmarks end with major gains; Nifty ends above 24,000 level

Indian equity benchmarks ended the week with significant gains, supported by broad-based buying across sectors and positive domestic economic data. Strong export growth and optimism surrounding the G7 Summit boosted investor sentiment.

In the week ended on Friday, 19 June 2025, the S&P BSE Sensex jumped 1,274.95 points or 1.68% to settle at 76,802.90. The Nifty 50 index added 390.2 points or 1.65% to settle at 24,013.10. The BSE 150 Mid-Cap index rose 3.24% to close at 16,753.20. The BSE 250 Small-Cap index added 3.66% to close at 7,047.01.

India's wholesale price inflation (WPI) rose to 9.68% in May, compared with 8.30% in the previous month. Food inflation stood at 4.49% in May, up from 3.11% in the previous month, while fuel and power inflation surged to 30.33% from 24.89%. Manufactured products inflation rose to 7.48%, compared with 6.68% earlier, while primary articles inflation increased to 4.99% from 3.78% in the previous month.

## Sensex Gainers - Weekly

SCRIPS	19-Jun-26	12-Jun-26	%Ch
TITAN	4423.20	4187.05	<b>5.64</b>
BHARTIARTL	1908.60	1822.55	<b>4.72</b>
BAJFINANCE	961.30	918.65	<b>4.64</b>
BAJAJFINSV	1766.20	1689.25	<b>4.56</b>
LT	4209.60	4050.20	<b>3.94</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	19-Jun-26	12-Jun-26	%Ch
TMPV	359.50	389.40	<b>-7.68</b>
INFY	1051.85	1116.45	<b>-5.79</b>
TCS	2126.40	2161.50	<b>-1.62</b>
TECHM	1410.80	1429.40	<b>-1.30</b>
KOTAKBANK	398.90	403.35	<b>-1.10</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	19-Jun-26	12-Jun-26	%Ch
HDFCLIFE	591.85	555.35	<b>6.57</b>
TITAN	4419.90	4184.00	<b>5.64</b>
SBILIFE	1800.20	1706.00	<b>5.52</b>
BHARTIARTL	1910.80	1822.50	<b>4.84</b>
BAJAJFINSV	1769.40	1689.10	<b>4.75</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	19-Jun-26	12-Jun-26	%Ch
TMPV	359.50	390.00	<b>-7.82</b>
INFY	1051.40	1116.40	<b>-5.82</b>
CIPLA	1351.80	1389.40	<b>-2.71</b>
TCS	2125.00	2161.40	<b>-1.68</b>
TECHM	1409.60	1429.20	<b>-1.37</b>

(Source: Capitaline)

India's merchandise exports climbed 18% in May at \$45.20 billion, up from \$38.30 billion a year earlier. Imports climbed 20.6% to \$73.41 billion from \$60.86 billion. The trade deficit widened to \$28.21 billion from \$22.56 billion in May last year. Services exports rose to \$36.76 billion in May from \$32.46 billion a year earlier, while services imports rose to \$19.06 billion from \$16.70 billion. The overall trade deficit, including services, widened to \$10.51 billion in May from \$6.79 billion a year ago.

India's southwest monsoon has stalled after reaching Kerala, leaving the country with a rainfall deficit of 35% as of 16 June. The shortfall is most severe in central India (63%) and eastern and northeastern regions (43%), while the monsoon has yet to reach Mumbai, more than a week after its normal arrival date. The delay comes amid growing concerns over a developing El Niño, which typically weakens monsoon rains. The India Meteorological Department (IMD) expects the current slowdown to persist for another five to six days due to unfavorable weather conditions. In response, the Centre has placed 150-200 districts under close monitoring, asked states to prepare crop contingency plans, and warned that a weak monsoon could increase food inflation and pressure agricultural output. Despite the concerns, officials said seed, fertiliser and reservoir stocks remain adequate for now.

### Global Markets:

#### Europe:

The U.K.'s inflation rate held steady at 2.8% in May 2026, unchanged from April's 2.8%. The U.K.'s May inflation reading was lower than the euro zone's 3.2% inflation rate and the U.S. inflation rate of 4.2% recorded in May. Meanwhile, the U.K.'s unemployment rate eased to 4.9% in the three months to April, compared with 5.0% in the preceding period.

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	19-Jun-26	12-Jun-26	%Ch
TRENT	3205.80	2755.30	<b>16.35</b>
BATAINDIA	747.70	669.10	<b>11.75</b>
BALKRISIND	2243.70	2013.10	<b>11.45</b>
YESBANK	25.41	23.02	<b>10.38</b>
BHEL	414.35	378.75	<b>9.40</b>

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	19-Jun-26	12-Jun-26	%Ch
TTML	44.19	46.44	<b>-4.84</b>
SYNGENE	440.75	458.55	<b>-3.88</b>
ZYDUSLIFE	1070.80	1104.70	<b>-3.07</b>
GLAND	2199.00	2262.20	<b>-2.79</b>
FORTIS	962.95	990.35	<b>-2.77</b>

(Source: Capitaline)

## World Markets

KEY INDICES	19-Jun-26	12-Jun-26	%Ch
DJIA	CLOSED	51202.26	#####
NASDAQ	CLOSED	25888.84	#####
BOVESPA	168333.61	171132.66	<b>-1.64</b>
FTSE 100	10363.27	10471.72	<b>-1.04</b>
CAC 40	8421.14	8350.87	<b>0.84</b>
DAX	24985.82	24635.30	<b>1.42</b>
MOEX RUSSIA	2420.56	2515.33	<b>-3.77</b>
NIKKEI 225	71250.06	66020.04	<b>7.92</b>
HANG SENG	CLOSED	24178.10	-
STRAITS TIMES	5192.70	5025.80	<b>3.32</b>
SHANGHAI COMPOSITE	CLOSED	4031.51	-
JAKARTA	6177.14	6007.66	<b>2.82</b>

(Source: Capitaline, [Investing.com](https://www.investing.com))

### Asia-Pacific:

The Bank of Japan (BOJ) raised its policy rate to 1.0%, marking the highest level in 31 years.

In China, retail sales declined 0.6% year-over-year in May. Industrial production provided a brighter note, rising 4.5% in May, ahead of expectations for 4.3% growth and rebounding from April's near three-year low of 4.1%. The unemployment rate edged down to 5.1% in May from 5.2% in April.

### United States:

The Federal Reserve kept the federal funds rate unchanged within a target range of 3.50% to 3.75%. The Fed's latest "dot plot" projections indicated that several policymakers now expect interest rates to move higher in 2026. The median year-end rate forecast increased to 3.8%, up from 3.4% in the March projections, suggesting that at least one rate hike could be considered next year.

(Source: Capitaline)

## Outlook and Technical View

Investors will closely monitor developments leading to the final US-Iran deal during the 60-days ceasefire period, progress in monsoon, movement in crude oil and gold prices. Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar will also dictate trend on the bourses in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be monitored.

From the technical standpoint, Nifty may find support at 23927, 23842, 23782, 23702 while levels of 24072, 24132, 24217, 24282 may act as resistance with pivot point at 23987.

(Source: Capitaline)

## Derivative Weekly Wrap

### OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
<b>NIFTY</b>	30-Jun-26	24077.00	23714.80	<b>1.53%</b>	<b>63.90</b>	659339	728000	<b>-9.43%</b>
<b>BANKNIFTY</b>	30-Jun-26	57838.00	56898.00	<b>1.65%</b>	<b>152.25</b>	138574	159708	<b>-13.23%</b>

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>ICICIPRULI</b>	500.30	502.45	30-Jun-26	<b>14.26%</b>
<b>COALINDIA</b>	451.30	453.20	30-Jun-26	<b>13.97%</b>
<b>VOLTAS</b>	1343.40	1348.80	30-Jun-26	<b>13.34%</b>
<b>ASHOKLEY</b>	156.66	157.28	30-Jun-26	<b>13.13%</b>
<b>EXIDEIND</b>	380.75	382.25	30-Jun-26	<b>13.07%</b>
<b>GODREJCP</b>	1000.60	1004.50	30-Jun-26	<b>12.93%</b>
<b>HINDPETRO</b>	392.10	393.60	30-Jun-26	<b>12.69%</b>
<b>NAUKRI</b>	984.25	988.00	30-Jun-26	<b>12.64%</b>
<b>TORNTPHARM</b>	4429.80	4446.60	30-Jun-26	<b>12.58%</b>
<b>IOC</b>	143.43	143.97	30-Jun-26	<b>12.49%</b>

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>BAJAJ-AUTO</b>	10066.00	9924.00	30-Jun-26	<b>-46.81%</b>
<b>WIPRO</b>	180.80	179.50	30-Jun-26	<b>-23.86%</b>
<b>HINDUNILVR</b>	2194.60	2181.40	30-Jun-26	<b>-19.96%</b>
<b>ASIANPAINT</b>	2732.90	2718.60	30-Jun-26	<b>-17.36%</b>
<b>MUTHOOTFIN</b>	3126.10	3112.60	30-Jun-26	<b>-14.33%</b>
<b>TATAPOWER</b>	402.35	400.75	30-Jun-26	<b>-13.20%</b>
<b>BHARATFORG</b>	2041.40	2035.00	30-Jun-26	<b>-10.40%</b>
<b>DRREDDY</b>	1272.10	1268.50	30-Jun-26	<b>-9.39%</b>
<b>BAJFINANCE</b>	961.80	959.50	30-Jun-26	<b>-7.93%</b>
<b>LUPIN</b>	2351.60	2346.60	30-Jun-26	<b>-7.06%</b>

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	82423145	80713185	<b>1.02</b>

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

<b>1. CABORUNIV</b>	<b>2. BDL</b>	<b>3. GVT&amp;D</b>	<b>4. ZENTEC</b>	<b>5. BHEL</b>
<b>6. JYOTICNC</b>	<b>7. AIAENG</b>	<b>8. SUZLON</b>	<b>9. POWERINDOA</b>	<b>10. ABB</b>
<b>11. APARINDS</b>	<b>12. ENRIN</b>	<b>13. DATAPATTNS</b>	<b>14. INFY</b>	

(Source: [Moneycontrol](#))

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