SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY WEEKLY REPORT

27th June 2026

Market Snapshot

KEY INDICES	25-Jun-26	19-Jun-26	05-Sep-25
S&P CNX NIFTY	24056.00	24013.10	**0.18**
SENSEX	77100.47	76802.90	**0.39**
NIFTY MIDCAP 100	61795.50	62517.30	**-1.15**
NIFTY SMLCAP 100	18790.35	18784.45	**0.03**

(Source: Capitaline, Investing.com)

Sectoral Snapshot

KEY INDICES	25-Jun-26	19-Jun-26	%Ch
NIFTY BANK	58177.05	57685.75	**0.85**
NIFTY AUTO	26977.75	26583.35	**1.48**
NIFTY FMCG	49419.25	49558.70	**-0.28**
NIFTY IT	27330.85	27426.85	**-0.35**
NIFTY METAL	12445.65	13020.80	**-4.42**
NIFTY PHARMA	24969.50	24460.30	**2.08**
NIFTY REALTY	826.25	811.90	**1.77**
BSE CG	80938.07	83600.96	**-3.19**
BSE CD	59369.44	61066.86	**-2.78**
BSE Oil & GAS	26309.83	26478.50	**-0.64**
BSE POWER	8043.89	8289.27	**-2.96**

(Source: Investing.com)

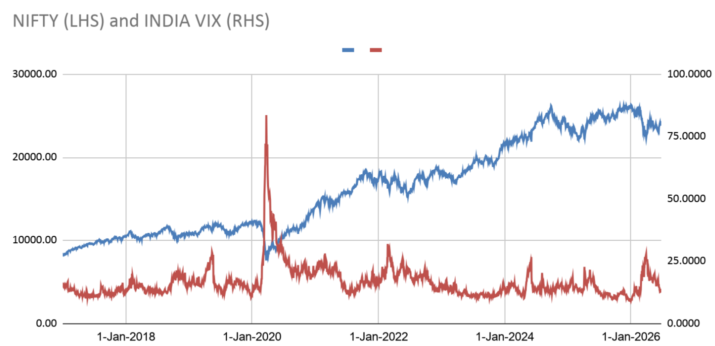
FII & DII Activities (Rs Crore)

19/06/2026 to 25/06/2026

Activities	FIIs	DIIs
Buy	93747.15	94393.35
Sell	88105.31	84452.05
Net	**5641.84**	**9941.30**

(Source: Capitaline)

Nifty Vs. INDIA VIX



(Source: NSE)

Market ends week higher on easing oil prices

Indian equity benchmarks ended the holiday-shortened week with modest gains, advancing in three of the four trading sessions. Markets started the week on a strong note as easing crude oil prices and fresh foreign institutional investor (FII) inflows boosted sentiment. A sharp correction on Tuesday, triggered by weak global cues, foreign fund outflows and profit booking, briefly dented investor confidence. However, benchmark indices rebounded strongly over the next two sessions, supported by renewed FII buying, easing concerns over interest rate hikes, lower crude prices and optimism surrounding a potential India-US trade deal. The Nifty reclaimed the 24,000 mark and managed to hold above it through the week. Overall, the market displayed resilience despite global volatility, ending the truncated week on a positive footing.

In the week ended on Thursday, 25 June 2026, the S&P BSE Sensex rose 297.57 points or 0.39% to settle at 77,100.47. The Nifty 50 index added 42.90 points or 0.18% to settle at 24,056. The BSE 150 MidCap Index fell 0.76% to close at

Sensex Gainers - Weekly

SCRIPS	25-Jun-26	19-Jun-26	%Ch
M&M	3181.80	3074.70	**3.48**
ICICIBANK	1387.90	1346.80	**3.05**
MARUTI	13741.75	13393.05	**2.60**
KOTAKBANK	409.00	398.90	**2.53**
HDFCBANK	796.05	780.00	**2.06**

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	25-Jun-26	19-Jun-26	%Ch
TATASTEEL	188.70	198.90	**-5.13**
NTPC	352.15	365.75	**-3.72**
ASIANPAINT	2645.85	2733.75	**-3.22**
WIPO	175.00	180.60	**-3.10**
INDUSINDBK	918.80	947.90	**-3.07**

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	25-Jun-26	19-Jun-26	%Ch
CIPLA	1440.10	1351.80	**6.53**
DRREDDY	1350.50	1272.10	**6.16**
M&M	3182.20	3074.80	**3.49**
ICICIBANK	1387.50	1346.50	**3.04**
SHREECEM	25735.00	25075.00	**2.63**

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	25-Jun-26	19-Jun-26	%Ch
HINDALCO	953.20	1010.00	**-5.62**
ONGC	233.10	246.25	**-5.34**
TATASTEEL	188.71	198.96	**-5.15**
JSWSTEEL	1231.00	1287.70	**-4.40**
NTPC	352.05	365.80	**-3.76**

(Source: Capitaline)

16,624.62. The BSE 250 SmallCap index slipped 0.16% at 7,035.37.

India's foreign exchange reserves declined by $9.99 billion to $671.63 billion during the week ended June 12, 2026, primarily due to a sharp fall in gold reserves, according to data released by the Reserve Bank of India (RBI) on Friday.

Growth in India's eight core industries slowed sharply to 0.5% in May 2026, the second-lowest reading in 21 months, according to data released by the Ministry of Commerce and Industry on 22 June 2026. The slowdown was broad-based, with five of the eight core sectors posting contractions during the month. The latest data point to a broad loss of momentum in industrial activity, with growth largely supported by electricity, cement and steel production.

Separately, India's private sector activity moderated in June, with all three key Purchasing Managers' Index (PMI) readings easing from the previous month, according to flash estimates released by HSBC and S&P Global.

The Manufacturing PMI slipped to 54.5 in June from 55.0 in May, signalling slower but continued expansion in factory activity. The Services PMI fell to 57.3 from 59.8, indicating a moderation in growth across the services sector.

As a result, the Composite PMI declined to 57.4 in June from 59.3 in the previous month, reflecting a softer pace of expansion in overall business activity while remaining firmly in growth territory.

Global Markets:

Global equity markets remained volatile during the week amid shifting expectations around US Federal Reserve policy, geopolitical tensions, and swings in technology stocks. Early in the week, European and Asian markets traded mixed to lower as political uncertainty in the UK and rising concerns over US interest rates weighed on sentiment, while Wall Street ended lower as investors reassessed valuations in the AI-led rally. Midweek, risk-off

Nifty Midcap 100 Gainers - Weekly

SCRIPS	25-Jun-26	19-Jun-26	%Ch
OFSS	10974.50	9638.50	**13.86**
M&MFIN	328.55	294.10	**11.71**
MSUMI	41.26	38.03	**8.49**
GLAND	2314.80	2199.00	**5.27**
HONAUT	39405.00	37460.00	**5.19**

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	25-Jun-26	19-Jun-26	%Ch
GUJARATGAS	344.00	388.45	**-11.44**
HINDZINC	518.05	563.55	**-8.07**
IRFC	91.77	99.51	**-7.78**
TIINDIA	3054.00	3285.60	**-7.05**
JINDALSTEL	1059.50	1137.70	**-6.87**

(Source: Capitaline)

World Markets

KEY INDICES	26-Jun-26	19-Jun-26	%Ch
DJIA	51876.11	CLOSED	**-**
NASDAQ	25297.62	CLOSED	**-**
BOVESPA	173295.14	168333.61	**2.95**
FTSE 100	10508.02	10363.27	**1.40**
CAC 40	8384.87	8421.14	**-0.43**
DAX	24671.22	24985.82	**-1.26**
MOEX RUSSIA	2285.61	2420.56	**-5.58**
NIKKEI 225	69360.88	71250.06	**-2.65**
HANG SENG	22671.86	CLOSED	**-**
STRAITS TIMES	5191.73	5192.70	**-0.02**
SHANGHAI COMPOSITE	4027.27	CLOSED	**-**
JAKARTA	5896.13	6177.14	**-4.55**

(Source: Capitaline, Investing.com)

sentiment intensified after a sharp global technology sell-off, with Asian equities—particularly South Korea—seeing steep declines, driven by fears of tighter monetary policy and inflation risks. However, sentiment improved later in the week as strong earnings and outlooks from semiconductor majors like Micron Technology and Qualcomm restored confidence in the AI trade, lifting Asian and European markets. Despite intermittent recovery attempts, global indices remained sensitive to Fed rate expectations, oil price movements, and geopolitical developments, leading to a mixed overall weekly performance.

(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 23976, 23896, 23753, 23682 while levels of 24199, 24342, 24422, 24502 may act as resistance with pivot point at 24119.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	30-Jun-26	24103.30	24077.00	**0.11%**	**47.30**	397766	659339	**-39.67%**
BANKNIFTY	30-Jun-26	58255.00	57838.00	**0.72%**	**77.95**	86682	138574	**-37.45%**

(Source: NSE)

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
TECHM	1437.10	1442.70	30-Jun-26	**28.45%**
BAJAJ-AUTO	9843.00	9880.00	30-Jun-26	**27.44%**
COLPAL	1993.00	2000.20	30-Jun-26	**26.37%**
WIPRO	175.00	175.63	30-Jun-26	**26.28%**
PETRONET	282.25	283.25	30-Jun-26	**25.86%**
SHREECEM	25735.00	25825.00	30-Jun-26	**25.53%**
LUPIN	2343.50	2351.50	30-Jun-26	**24.92%**
VOLTAS	1302.40	1306.80	30-Jun-26	**24.66%**
NATIONALUM	332.15	333.25	30-Jun-26	**24.18%**
VEDL	273.45	274.35	30-Jun-26	**24.03%**

(Source: NSE)

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
PAGEIND	40950.00	40735.00	30-Jun-26	**-38.33%**
INDIGO	5450.00	5421.50	30-Jun-26	**-38.17%**
BAJFINANCE	980.40	975.95	30-Jun-26	**-33.13%**
SRF	2732.90	2721.30	30-Jun-26	**-30.99%**
LT	4216.40	4201.00	30-Jun-26	**-26.66%**
SIEMENS	3627.90	3618.10	30-Jun-26	**-19.72%**
NMDC	84.94	84.78	30-Jun-26	**-13.75%**
RBLBANK	371.05	370.40	30-Jun-26	**-12.79%**
GODREJCP	1034.60	1032.90	30-Jun-26	**-11.99%**
CHOLAFIN	1799.20	1796.60	30-Jun-26	**-10.55%**

(Source: NSE)

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	171449315	167287790	**1.02**

(Source: Capitaline)

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

1. CIPLA	**2. DRREDDY**	**3. PPLPHARMA**	**4. GLAND**	**5. AUROPHARMA**
6. AJANTAPHARM	**7. ZYDUSLIFE**	**8. NATIONALUM**	**9. VEDL**	**10. HINDZINC**
11. JINDALSTEL	**12. HINDALCO**	**13. TATASTEEL**	**14. SAIL**	**15. JSWSTEEL**
16. APLAPOLLO	**17. NMDC**	**18. HINDCOPPER**		

(Source: Moneycontrol)

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