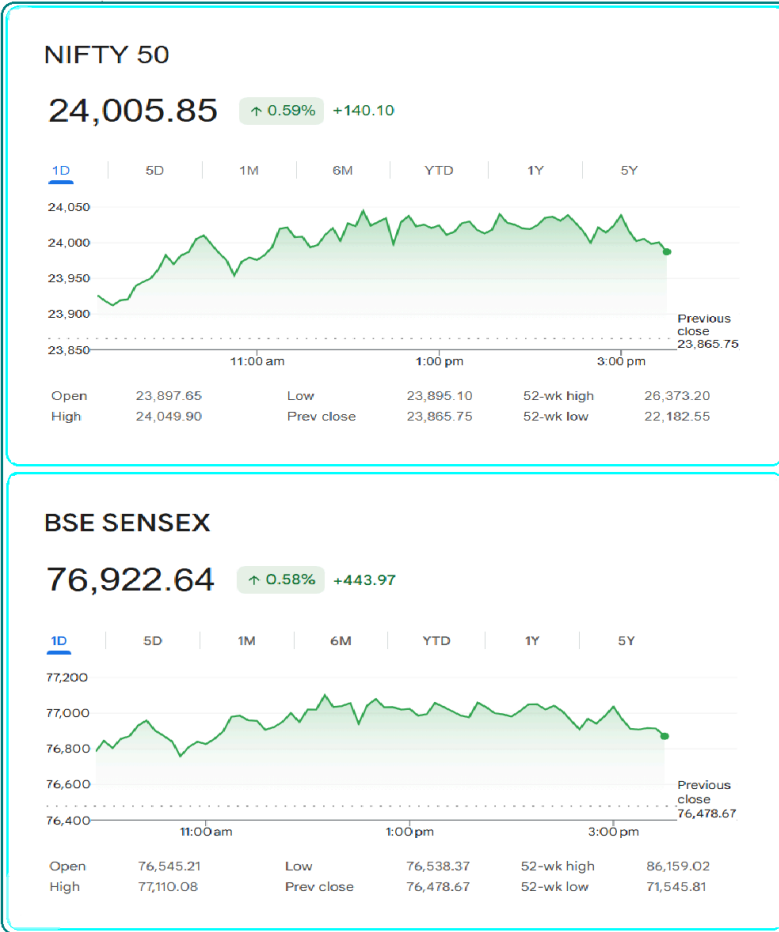


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24005.85	23865.75	<b>0.59%</b>
<b>S&amp;P BSE SENSEX</b>	76922.64	76478.67	<b>0.58%</b>
<b>NIFTY MID100</b>	62008.80	61797.70	<b>0.34%</b>
<b>NIFTY SML100</b>	18931.05	18863.10	<b>0.36%</b>

(Source: [NSE](#), [BSE](#))

## Market Wrap Up

- The headline equity benchmark ended with moderate gains, snapping a two-session losing streak, supported by firm global cues and a technical rebound after recent declines. Sentiment improved as global markets traded higher, leading to value buying in beaten-down large-cap stocks. Gains in heavyweight sectors such as banking, IT, and auto aided the upmove, while overall trade remained largely sentiment-driven in the absence of major domestic triggers. The Nifty settled above the 24,000 level.
- The S&P BSE Sensex jumped 443.97 points or 0.58% to 76,922.64. The Nifty 50 index added 140.10 points or 0.59% to 24,005.85. In the past two consecutive trading sessions, the Sensex dropped 0.80% while the Nifty fell 0.79%. The BSE 150 MidCap Index rose 0.29% and the BSE 250 SmallCap Index added 0.19%.
- Among the sectoral indices, the Nifty Realty index (up 3.58%), the Nifty FMCG index (up 2.08%) and the Nifty Media index (up 2.07%) outperformed the Nifty 50 index. Meanwhile the Nifty IT index (down 2.01%), the Nifty Metal index (down 0.99%) and the Nifty Pharma index (down 0.57%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **July** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **919** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **SBIN, ICICIBANK**.
- Short** position build up for the **July** series has been witnessed in **HDFCBANK, INFY**.
- Unwinding** position for the **July** series has been witnessed in **RELIANCE, ITC**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	58033.05	57542.90	0.85%
NIFTY AUTO	26783.20	26479.80	1.15%
NIFTY FMCG	49806.80	48794.20	2.08%
NIFTY IT	25769.80	26299.05	-2.01%
NIFTY METAL	12394.75	12519.15	-0.99%
NIFTY PHARMA	25182.70	25326.40	-0.57%
NIFTY REALTY	859.25	829.55	3.58%
BSE CG	81155.66	81413.36	-0.32%
BSE CD	60021.27	59628.80	0.66%
BSE Oil & GAS	26083.23	26029.33	0.21%
BSE POWER	8081.90	8094.74	-0.16%

(Source: [NSE](#), [BSE](#))

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	70474.96	70062.32	0.59%
HANG SENG	CLOSED	22881.02	-
STRAITS TIMES	5161.50	5170.65	-0.18%
SHANGHAI	4112.45	4094.40	0.44%
KOSPI	8303.41	8476.48	-2.04%
JAKARTA	5695.12	5643.19	0.92%
TAIWAN	47018.99	46125.91	1.94%
KLSE COMPOSITE	1656.83	1664.06	-0.43%
ALL ORDINARIES	8931.40	8986.20	-0.61%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	119242.61	140407.22
NSE F&O	116760.06	351389.33

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1140.50

(Source: [NSE](#))

## Corporate News

- Maruti Suzuki India** reported a 19.3% year-on-year increase in total sales to 2,00,390 units in June. Total domestic passenger vehicle (PV) sales rose 23.8% to 1,47,187 units from 1,18,906 units in the year-ago month, while overall domestic sales, including light commercial vehicles (LCVs), increased to 1,50,150 units from 1,21,339 units. Exports also remained strong, rising 13% to 42,768 units from 37,842 units a year earlier. The company's total domestic sales, including PVs, LCVs and OEM supplies, stood at 1,57,622 units in June, compared with 1,30,151 units in the same month last year.
- Mahindra & Mahindra** reported a 37% increase in total sales, including exports, to 1,06,207 units in June, compared with 77,742 units in the same month last year. The company's domestic SUV sales rose 28% year-on-year to 60,393 units during the month from 47,306 units in June 2025. Commercial vehicle domestic sales stood at 26,076 units in June, registering a 35% year-on-year growth. Within this, domestic sales logged 12% growth year-on-year to 58,177 units from 51,769 tractors in June 2025. The company sold 1,758 tractors, registering an 8% year-on-year growth
- Escorts Kubota Ltd** reported a 19.1% rise in total tractor sales at 13,695 units in June 2026, as compared to the same month last year. The company had sold a total of 11,498 units in June 2025. Domestic sales were at 13,172 units last month as against 10,997 units in June 2025, up 19.8%. Exports were up 4.4% last month at 523 units, as compared to 501 units in the year-ago month.
- Ashok Leyland** reported a 25.18% increase in total vehicle sales (domestic and exports) to 19,194 units in June 2026, compared with 15,333 units sold in June 2025. In the domestic market, total vehicle sales climbed 26.28% YoY to 17,912 units from 14,184 units a year earlier.
- Hyundai Motor India** reported total sales of 51,335 units in June 2026. The automaker sold 39,635 units in the domestic market during the month, while exports stood at 11,700 units.
- Force Motors** has inked a deal with the Ministry of Road Transport & Highways to join the government's

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ETERNAL	279.70	264.60	5.71%
ADANIENT	3143.60	3036.00	3.54%
NESTLEIND	1453.80	1405.20	3.46%
ASIANPAINT	2716.40	2635.70	3.06%
HINDUNILVR	2182.00	2118.20	3.01%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1034.20	1071.80	-3.51%
TECHM	1362.20	1404.70	-3.03%
TCS	1982.60	2031.50	-2.41%
HINDALCO	939.70	956.60	-1.77%
TATASTEEL	185.17	188.06	-1.54%

(Source: [Moneycontrol](#))

- **VA Tech WABAG** has secured a large international order from the City of Vienna's Municipal Department MA 31 - Wiener Wasser for the expansion of the Donauinsel Water Works in Vienna, Austria.
- **Transformers & Rectifiers (India)** received an ultra-mega order from Power Grid Corporation of India (PGCIL) for the manufacturing of transformers of various ratings, along with all associated works.
- **Reliance Power** announced its entry into the rapidly evolving field of Artificial Intelligence (AI) and allied new-age technologies through the incorporation of new subsidiaries.

commercial vehicle replacement scheme in Delhi-NCR. This initiative, backed by a Rs 9,585-crore fund, encourages replacing older, polluting trucks and buses with BS-VI or electric models. Force Motors will leverage its dealerships to support this transition, aiming to modernize the region's fleet and cut emissions.

- **Ola Electric** registered 43,719 vehicles in the first quarter of FY27, up from 22,252 units in Q4 FY26. June registrations stood at 16,144 units.
- **Adani Green Energy** has achieved a landmark 20 GW of operational renewable capacity, the first in India to do so via greenfield development. This significant feat, accomplished within a decade, generates enough clean electricity annually to power nearly 3% of India's needs.
- **IndiGo** has introduced 'IndiGo Lite', a new budget-friendly Economy Class fare for travellers with just cabin baggage. This option, available on all direct bookings from July 1 for travel starting July 15, includes a 7kg baggage allowance and a complimentary seat. Passengers can purchase additional services like checked baggage and meals separately.
- **RITES** has received a Project Management Consultancy (PMC) order worth Rs 175.41 crore from Babasaheb Bhimrao Ambedkar University (BBAU).
- **EPACK Durable** received approval from the Government of Andhra Pradesh for a tailor-made incentive package under the Mega Category of the Andhra Pradesh Electronics Manufacturing Policy (4.0).
- **RailTel Corporation of India** announced that it has received a work order worth Rs 107.61 crore from Mahanadi Coalfields (MCL).

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

## Global News

- China RatingDog Manufacturing PMI inched down to a three-month low of 51.7 in June 2026 from 51.8 in May.
- U.S. house price index decreased 0.1% in April 2026, following an upwardly revised 0.2% rise in March. On a yearly basis, home prices rose 2% in April, following an upwardly revised 1.8% increase in March.
- U.S. Conference Board said its consumer confidence index rose to 91.2 this month from a downwardly revised 90.6 in May.
- U.S. Chicago Business Barometer fell to 56.7 in June 2026 from 62.7 in the previous month.
- U.K. S&P Global Manufacturing PMI posted 52.5 in June, down from May's four-year high of 53.9.
- Eurozone consumer price inflation dropped to 2.8% in June 2026, down from 3.2% in May. The core rate fell to 2.4% from 2.6% in May.
- Eurozone S&P Global Manufacturing PMI declined to 51.4 in June 2026 from 51.6 in May.
- Germany's consumer price inflation eased to 2.3% year-over-year in June 2026, down from 2.6% in May and declined 0.3% month-on-month.
- German S&P Global Manufacturing PMI was revised higher to 50.3 in June 2026, compared to 50.1 in the previous month.
- French S&P Global Manufacturing PMI was revised higher to 51.2 in June 2026 from 49.7 in May.
- Japan S&P Global Manufacturing PMI was revised slightly lower to 54.8 in June 2026 from May's reading of 54.5.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

## Economic News

- Crude Oil traded at US\$ 68.84/bbl (IST 17:00).
- INR weakened to Rs. 95.25 from Rs. 94.67 against each US\$ resulting in daily change of 0.61%.
- India's HSBC Manufacturing PMI eased to 54.2 in June 2026 from 55.0 in May, revised lower from the preliminary reading of 54.5.
- India's gross Goods and Services Tax (GST) collections rose 13.9% year-on-year to Rs 1,94,812 crore in June 2026, compared with Rs 1,71,105 crore in the same month last year. On a cumulative basis, gross GST collections in the April-June period of FY27 reached Rs 6,31,699 crore, an 8.4% increase over Rs 5,82,542 crore collected in the corresponding period last year.
- India's fiscal deficit widened sharply to INR 1.6 trillion in April-May 2026-27, up from INR 0.1 trillion a year earlier, reaching

9.6% of the full-year target compared to 0.8% in the same period last year.

- **LPG Price Cut:** Commercial LPG cylinder prices have seen a significant reduction of Rs 183.50, effective July 1, 2026. This marks the first price cut for 19-kg cylinders this year, bringing relief to businesses. Domestic cylinder rates, however, remain unchanged. The price drop is attributed to easing global crude oil prices following a ceasefire extension between the US and Iran, impacting key shipping routes.
- **Jet fuel, or aviation turbine fuel (ATF),** prices were cut by nearly Rs 5 per litre on Wednesday. State-owned fuel retailers reduced the price of ATF by Rs 5 per litre, taking the rate in Delhi to about Rs 110 per litre.

(Source: [Economic Times](#), [Business Standard](#))

## Forthcoming Events

### Board Meetings as on 02/07/2026

IRB InvIT Fund	Fund Raising
Khadim India Limited	Fund Raising

(Source: NSE)

### Corporate Actions as on 02/07/2026

Chembond Material Technologies Limited	Dividend - Rs 2 Per Share
Lloyds Enterprises Limited	Dividend - Re 0.05 Per Share

(Source: NSE)

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