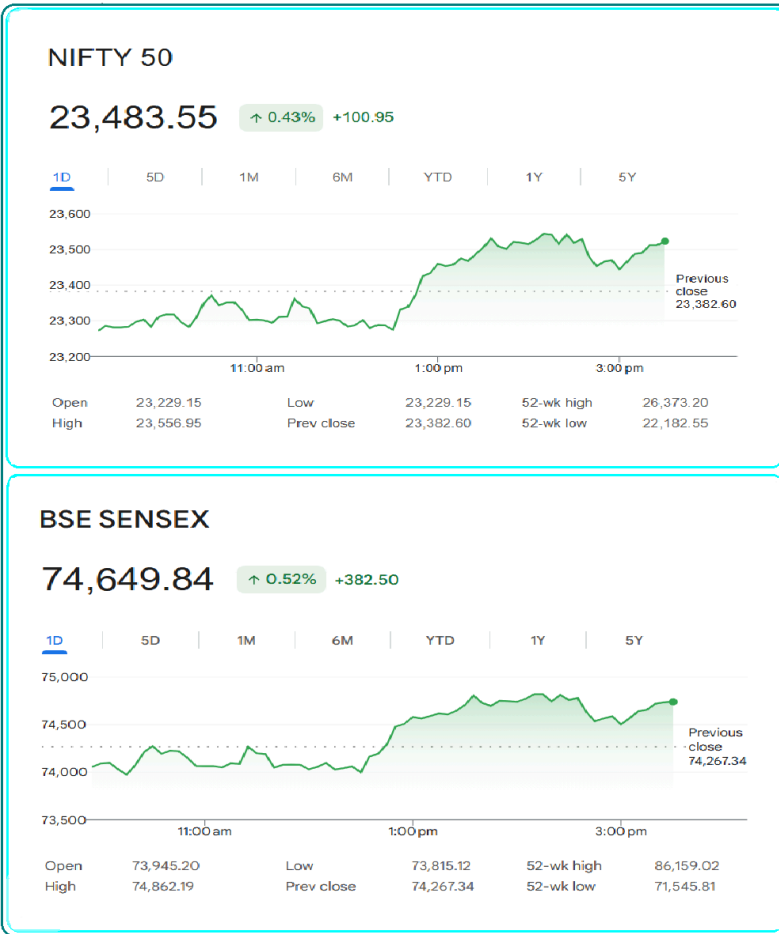


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23483.55	23382.60	0.43%
S&P BSE SENSEX	74649.84	74267.34	0.52%
NIFTY MID100	60942.00	60827.95	0.19%
NIFTY SML100	18052.30	17979.80	0.40%

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

Market Wrap Up

- The headline equity benchmark ended higher, snapping a four-day losing streak, supported by a decline in crude oil prices. Investor sentiment improved, boosting risk appetite across the market, while participants closely monitored developments surrounding the ceasefire situation. The Nifty rebounded sharply from its intraday low of 23,229.15 and reclaimed the 23,500 mark during the session.
- The S&P BSE Sensex surged 382.50 points or 0.52% to 74,649.84. The Nifty 50 index rallied 100.95 points or 0.43% to 23,483.55. In the past four consecutive trading sessions, the Sensex tanked 2.90% while the Nifty fell 2.70%. The BSE 150 MidCap Index rose 0.33% and the BSE 250 SmallCap Index rallied 0.50%.
- Among the sectoral indices, the Nifty IT index (up 4.23%), the Nifty Consumer Durables index (up 1.30%) and the Nifty FMCG index (up 0.76%) outperformed the Nifty 50 index. Meanwhile the Nifty Pharma index (down 0.86%), the Nifty Financial Services index (down 0.59%) and the Nifty Healthcare index (down 0.52%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **June** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **646** contracts at the end of the day.
- **Long** position build up for the **June** series has been witnessed in **RELIANCE, SBIN, BHARTIARTL, HDFCBANK, INFY**.
- **Short** position build up for the **June** series has been witnessed in **ICICIBANK, BAJFINANCE, POWERINDIA**.
- **Unwinding** position for the **June** series has been witnessed in **ONGC, HCLTECH, LTM**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	53714.65	53643.10	0.13%
NIFTY AUTO	26079.45	25891.90	0.72%
NIFTY FMCG	48612.80	48247.70	0.76%
NIFTY IT	31116.55	29854.25	4.23%
NIFTY METAL	13557.65	13506.55	0.38%
NIFTY PHARMA	24006.30	24214.25	-0.86%
NIFTY REALTY	773.35	768.20	0.67%
BSE CG	79301.15	78848.83	0.57%
BSE CD	57585.57	56885.28	1.23%
BSE Oil & GAS	26566.67	26612.38	-0.17%
BSE POWER	8090.74	8140.04	-0.61%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	66734.24	66934.33	-0.30%
HANG SENG	26038.32	25398.18	2.52%
STRAITS TIMES	5097.42	5037.86	1.18%
SHANGHAI	4075.10	4057.74	0.43%
KOSPI	8801.49	8788.38	0.15%
JAKARTA	6195.43	6127.38	1.11%
TAIWAN	45557.31	45337.91	0.48%
KLSE COMPOSITE	CLOSED	CLOSED	-
ALL ORDINARIES	8966.00	8969.80	-0.04%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	143327.01	132672.24
NSE F&O	202073.69	161101.77

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	8362.92

(Source: [NSE](#))

Corporate News

- **Hero MotoCorp** reported 12% rise in dispatches at 5,70,068 units in May 2026. In the year-ago period, the sales stood at 5,07,701 units. The company's global business recorded 78% growth with dispatches of 33,284 units.
- **Tata Motors Ltd** reported a 17% growth in total commercial vehicle sales at 32,850 units in May. The company had sold 28,147 units in May, 2025. Domestic sales were up 19% at 30,784 units in the reported month as compared to 25,872 units in May 2025. International business volumes declined 9% at 2,066 units as against 2,275 units in the year-ago month
- **Gujarat Mineral Development Corporation Ltd** is set to develop India's first AI-powered rare earth supply chain observatory in collaboration with the University of Cambridge. The project is structured as a phased two-year programme with an investment of GBP 600,000.
- **Unilever** is launching a new fragrance research center at IIT Bombay. This is part of a major global investment using artificial intelligence to create new scents. The company aims to innovate fragrances alongside product development. This move strengthens Unilever's internal capabilities and partnerships with fragrance houses. India will play a key role in this global network.
- **Axis Bank** has boosted its stake in Axis Max Life Insurance. The bank and its subsidiaries now hold 19.99 percent of the insurer. This move follows an investment of up to Rs 380 crore. The Reserve Bank of India granted approval for this investment. Axis Max Life Insurance reported a gross written premium of Rs 38,877 crore for FY26.
- **Servotech Renewable Power System** has entered into a Memorandum of Understanding (MoU) with the Haryana Enterprises Promotion Centre (HEPC) to expand its operations in Haryana.
- **Infosys** and Germany's Handelsblatt Media Group, launched Editorial Link Intelligence (ELI) to elevate digital journalism by delivering enhanced storytelling and driving deeper reader engagement.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TCS	2446.90	2297.40	6.51%
INFY	1270.80	1202.50	5.68%
HCLTECH	1243.50	1195.10	4.05%
ADANIENT	2968.10	2909.40	2.02%
TECHM	1571.40	1543.20	1.83%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
NTPC	367.40	378.70	-2.98%
AXISBANK	1251.10	1275.90	-1.94%
POWERGRID	282.15	286.15	-1.40%
DRREDDY	1274.00	1290.40	-1.27%
HDFCLIFE	579.90	586.55	-1.13%

(Source: [Moneycontrol](#))

- **Anant Raj** has entered into memorandum of Understanding (MoU) with the Haryana Enterprises Promotion Centre (HEPC) to establish data centre and cloud services in Haryana.

- **Adani Ports and Special Economic Zone** announced that it has handled 48.3 million metric tons (MMT) of total cargo in May 2026, which is higher by 16% on a year-on-year (YoY) basis.
- **Intellect Design Arena** launched AI Digital Banking platform tailored for challenger banks and digital-native financial institutions across the UK and Europe.
- **Coforge** announced the launch of its Nexa Agentic AI Platform, a new artificial intelligence-powered business platform aimed at the global insurance industry.
- **PNC Infratech** has received a letter of award (LoA) from the Lucknow Development Authority, Uttar Pradesh, for an EPC contract worth Rs 194.40 crore.
- **Transrail Lighting** announced fresh order wins worth Rs 575 crore and disclosed that it holds the lowest bidder (L1) position for projects worth around Rs 400 crore.
- **NMDC** reported a 19.86% year-on-year (YoY) increase in iron ore production to 5.31 MT in May 2026, compared with 4.43 MT in May 2025.

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

Global News

- U.S. S&P Global Manufacturing PMI climbed to 55.1 in May 2026, up from 54.5 in April.
- U.S. ISM Manufacturing PMI rose to 54 in May 2026 from 52.7 in each of the previous two months.
- Eurozone consumer price inflation reached 3.2% in May 2026, up from 3.0% in April. The core rate, excluding energy and food, climbed to 2.5% from 2.2%.
- Australia's current account deficit widened to AUD 27.1 billion in the first quarter of 2026 from an upwardly revised AUD 23.0 billion in the previous quarter.

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

Economic News

- Crude Oil traded at US\$ 91.09/bbl (IST 17:00).
- INR weakened to Rs. 95.28 from Rs. 94.99 against each US\$ resulting in daily change of 0.31%.
- Rising petrol and diesel prices are poised to add fresh inflationary pressures to India's economy, with higher transport and manufacturing costs expected to feed through to consumer prices in the coming months. Petrol and diesel prices have increased by about Rs 7.5 per litre since May 15, and further increases remain likely if global crude oil prices stay elevated.
- India is introducing a Producer Price Index for the first time. This new measure will track prices received by producers of goods and services. It aims to provide a more comprehensive view of inflation. The index will help policymakers better understand and manage price pressures. This move aligns India with major global economies and modernizes its statistical tools.
- India has suspended its 11% import duty on cotton until October. This move has immediately reversed the recent rally in cotton prices, with both bales and yarn seeing a drop. Industry insiders expect further price decreases in the coming days. This decision aims to ease prices, prevent hoarding, and boost the competitiveness of Indian textile exports.
- India's fuel exports are set to rise following export duty cuts. This move aims to restore shipments to Europe and West Asia. High crude oil prices and a weaker rupee will aid these exports. The country is also diversifying its energy sources, reducing reliance on traditional suppliers.
- LPG sales fell 24% year-on-year in May, a much steeper decline than the month before while petrol and diesel sales by state-run oil companies rose 4.8% and 6.4%, respectively.
- The recent trade accord between India and Oman represents a significant leap toward energy independence and economic integration. Experts note that this agreement lays down a sustainable foundation for essential energy imports. With Oman providing an advantageous manufacturing and logistics network, Indian companies are set to thrive.
- India faces critical trade negotiations with the US and UK this week. New Delhi seeks to protect its exporters from potential tariffs and safeguard duties. Talks aim to secure better terms for Indian steel exports to the UK and avoid US trade actions. These agreements are vital for India's export diversification and attracting investment during uncertain times.
- Aquapulse has secured Rs. 45 crore in a funding round led by NABVENTURES. This capital will boost farm technology and disease management. The company will also expand its farmer network in eastern India. Processing and export operations will scale up. Aquapulse connects small shrimp farmers to global markets, ensuring stable revenue and transparency.

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

Forthcoming Events

Board Meetings as on 03/06/2026

Ideaforge Technology Limited	Fund Raising
Indiabulls Limited	Fund Raising
Skipper Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 03/06/2026

Anand Rathi Wealth Limited	Bonus 1:1
Ashok Leyland Limited	Interim Dividend - Rs 2.50 Per Share
Foseco India Limited	Dividend - Rs 25 Per Share
Navneet Education Limited	Interim Dividend - Rs 1.50 Per Share

(Source: NSE)

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