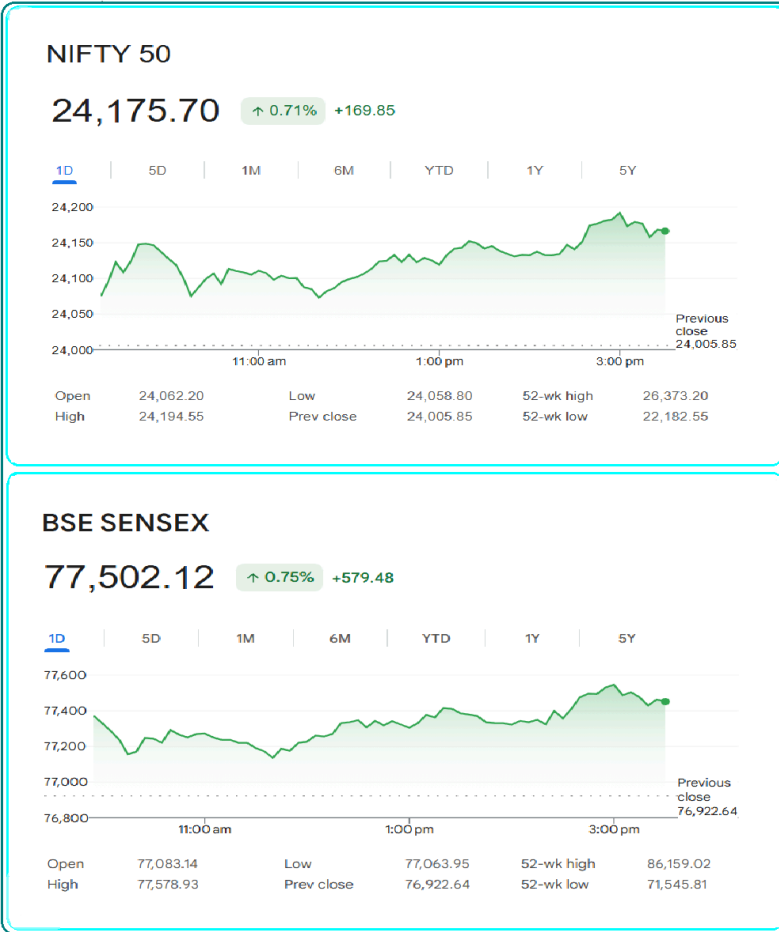


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24175.70	24005.85	0.71%
S&P BSE SENSEX	77502.12	76922.64	0.75%
NIFTY MID100	62307.90	62008.80	0.48%
NIFTY SML100	19167.80	18931.05	1.25%

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

Market Wrap Up

- The headline equity benchmark ended with major gains, extending gains for the second straight session, led by a strong rally in IT stocks. Sentiment was also supported by easing crude oil prices amid ongoing Iran-US peace talks. However, investors remained cautious as the rupee edged lower against the US dollar. The Nifty settled above the 24,150 mark.
- The S&P BSE Sensex zoomed 579.48 points or 0.75% to 77,502.12. The Nifty 50 index added 169.85 points or 0.71% to 24,175.70. In the two consecutive trading sessions, the Sensex rallied 1.33% while the Nifty jumped 1.29%.
- The BSE 150 MidCap Index rose 0.65% and the BSE 250 SmallCap Index added 0.98%.
- Among the sectoral indices, the Nifty IT index (up 4.64%), the Nifty Realty index (up 1.45%) and the Nifty Consumer Durables index (up 1.43%) outperformed the Nifty 50 index.
- Meanwhile the Nifty PSU Bank index (down 0.43%), the Nifty Bank index (flat (0.00%)) and the Nifty Private Bank index (up 0.13%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **July** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **5085** 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 **RELIANCE, LT, HDFCBANK**.
- **Unwinding** position for the **July** series has been witnessed in **INFY, GODREJCP**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	58031.65	58033.05	0.00%
NIFTY AUTO	27108.20	26783.20	1.21%
NIFTY FMCG	50084.70	49806.80	0.56%
NIFTY IT	26965.05	25769.80	4.64%
NIFTY METAL	12503.90	12394.75	0.88%
NIFTY PHARMA	25308.90	25182.70	0.50%
NIFTY REALTY	871.70	859.25	1.45%
BSE CG	80559.20	81155.66	-0.73%
BSE CD	60891.21	60021.27	1.45%
BSE Oil & GAS	26208.32	26083.23	0.48%
BSE POWER	8029.89	8081.90	-0.64%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	68733.15	70474.96	-2.47%
HANG SENG	23055.03	22881.02	0.76%
STRAITS TIMES	5217.15	5161.50	1.08%
SHANGHAI	4028.90	4112.45	-2.03%
KOSPI	7648.09	8303.41	-7.89%
JAKARTA	5744.56	5695.12	0.87%
TAIWAN	46744.16	47018.99	-0.58%
KLSE COMPOSITE	1661.83	1656.83	0.30%
ALL ORDINARIES	8930.90	8931.40	-0.01%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	122377.81	119242.61
NSE F&O	114999.04	116760.06

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	311.82

(Source: [NSE](#))

Corporate News

- Hero MotoCorp** reported a 2.3% year-on-year decline in total wholesale dispatches to dealers at 5,41,159 units in June. The two-wheeler maker sold 5,02,890 units in the domestic market during the month, down from 5,25,136 units in June last year. Exports, however, climbed to 38,269 units, compared with 28,827 units in the corresponding month a year ago.
- Tata Motors Passenger Vehicles Ltd** reported a 69% year-on-year increase in total sales to 63,083 units in June. Domestic passenger vehicle sales rose 67% to 62,076 units during the month, compared with 37,083 units in June last year, while international business sales climbed to 1,007 units, up from 154 units in the corresponding period.
- Bajaj Auto** reported a 28% year-on-year increase in total sales, including exports, to 4,63,202 units in June. The automaker had sold 3,60,806 vehicles in June last year. Total domestic sales, including commercial vehicles, stood at 2,09,837 vehicles units in the previous month, up 11% from 1,88,460 units in June 2025.
- TVS Motor Company** reported a 47% year-on-year increase in total sales to 590,003 units in June 2026, compared with 402,001 units in the same month last year. Total two-wheelers sales, including moped, registered a growth of 47% at 565,417 units in the previous month as against 385,698 units in June 2025. At the same time, total sales from international business spiked 47% at 172,355 units in the previous month as against 117,145 units in June 2025.
- Royal Enfield** reported a 27% growth in total sales at 1,14,032 motorcycles in June 2026 compared to 89,540 units sold in the corresponding month last year. The company's domestic sales rose sharply by 34% to 1,02,930 units in June 2026, up from 76,957 units in the same month last year. However, export volumes declined by 12% year-on-year, falling to 11,102 units from 12,583 units in June 2025.
- Tata Motors** has officially launched the Tata Sierra EV in India, with prices starting at Rs. 18.79 lakh (ex-showroom). Available with 63 kWh and 75 kWh battery packs, the electric SUV offers a claimed MIDC range of up

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INFY	1040.90	985.30	5.64%
TECHM	1421.30	1362.20	4.34%
TCS	2068.10	1982.60	4.31%
HCLTECH	1078.10	1034.20	4.24%
BAJAJFINSV	1855.70	1797.60	3.23%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
MAXHEALTH	1127.40	1139.90	-1.10%
LT	4059.40	4092.60	-0.81%
TMPV	345.95	347.80	-0.53%
NESTLEIND	1446.20	1453.80	-0.52%
AXISBANK	1362.60	1368.70	-0.45%

(Source: [Moneycontrol](#))

- **Kotak Mahindra Bank** announced that the loan portfolio of Kotak Mahindra Investments (KMIL), aggregating to an outstanding amount of Rs. 9,587.62 crore as on 01 July 2026, stand directly assigned to the Bank, with effect from the same date.
- **Crompton Greaves Consumer Electricals** securing a domestic order worth Rs 29.77 crore from Maharashtra State Electricity Distribution Company (MSEDCL) for supply of 1,397 solar photovoltaic water pumping systems.
- **Aurobindo Pharma** has completed the transfer of the Company's domestic branded generic pharmaceutical formulations products business, as a going concern to Auropharm with effect from 01 July 2026.
- **NMDC** reported a 44.26% year-on-year (YoY) increase in iron ore production to 5.15 million tonnes (MT) in June 2026, compared with 3.57 MT in June 2025. Iron ore sales rose 11.17% YoY to 3.98 MT in June 2026 as against 3.58 MT in June 2025.

to 665 km. It also introduces several segment-first features to compete with the Mahindra BE 6, Mahindra XEV 9e, Hyundai Creta Electric, Maruti Suzuki e Vitara, and other electric SUVs in India's fast-growing EV market.

- **Adani Enterprises** is set to invest a massive Rs 1.08 lakh crore in Odisha for a new greenfield aluminium project, in partnership with Abu Dhabi's IHC. This significant venture aims to boost India's aluminium production by nearly 50%, featuring a large-scale refinery, smelter, and downstream park. The project, supported by substantial power generation, is expected to create over 50,000 jobs, marking a major FDI in India's metal sector.
- **Bharat Petroleum Corporation Ltd** is set to gain full control of its Brazil-based oil and gas joint venture. Through its subsidiary BPRL Ventures BV, BPCL has signed agreements to acquire the remaining stake in IBV Brazil Petroleo Limitada. This move, approved by the National Company Law Tribunal as part of insolvency proceedings, aims to bolster India's energy security by expanding its overseas upstream assets.
- HSBC has secured a massive 1.2 million sq ft office space in Bengaluru's **Prestige** JRC Signature Towers. This significant deal, valued at over Rs 3,000 crore for a 20-year lease, highlights Bengaluru's appeal for multinational financial firms. The under-construction campus, set for completion in October 2027, underscores the strong demand for integrated, high-quality office spaces in India's tech and finance hub.
- **Mankind Pharma** has partnered with Denovo Sciences to accelerate drug discovery using artificial intelligence. This collaboration aims to significantly cut down early research timelines, enhance the quality of potential drug candidates, and ensure only the most promising ones advance.
- **Texmaco Rail & Engineering** has received two domestic orders for manufacture and supply of wagons and rakes worth Rs 351.16 crore.

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

Global News

- U.S. S&P Global Manufacturing PMI was sharply revised down to 53.9 in June 2026, significantly below May's final reading of 55.1.
- U.S. ISM Manufacturing PMI for the US fell to 53.3 in June 2026, down from 54.0 in May.
- Eurozone seasonally adjusted unemployment rate came in at 6.2% in May 2026, tying the record lows from late 2024 and unchanged from the prior month.
- Australia unexpectedly posted a trade deficit of AUD 3.02 billion in May 2026, shifting from a downwardly revised AUD 1.38 billion surplus in the previous month. Exports dropped 6.9% month-on-month to a four-month low of AUD 43.61 billion, reversing a 7.2% increase in April while imports grew 2.6% month-on-month to a record high of AUD 46.63 billion, accelerating from a downwardly revised 0.2% increase in April.

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

Economic News

- Crude Oil traded at US\$ 67.47/bbl (IST 17:00).
- INR weakened to Rs. 95.40 from Rs. 95.25 against each US\$ resulting in daily change of 0.16%.
- Indian car sales surged over 24% in June, marking a strong third consecutive month of double-digit growth. This boom, fueled by tax cuts and lower interest rates, saw major players like Maruti Suzuki and Tata Motors report significant increases. Despite minor setbacks for Hyundai, the overall automotive sector is experiencing robust demand, with electric vehicle adoption also showing promising trends.
- The government has boosted rural employment wages by over 10% with the new Viksit Bharat-Guarantee for Rozgar and Ajeevika Mission-Gramin, replacing MGNREGA from July 1. Daily wages now start at Rs. 300, with an average of Rs. 327.4, and the annual employment guarantee is extended to 125 days. States with historically lower rates will see significant increases, though some critics deem the hike insufficient.
- India's private credit market is booming, doubling in five years to \$25 billion as companies seek alternatives to traditional bank loans for expansion and acquisitions. Banks, wary of complex financing, are leaving a gap that private lenders are filling with flexible, albeit costlier, solutions. While growth is strong, regulators are urging caution due to emerging risks like rising defaults and market opacity. Retailers leased 2.4 million sq ft across the top eight cities, a 23.2% quarter-on-quarter (QoQ) and 17.6% year-on-year (YoY) increase, according to Cushman & Wakefield.

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

Forthcoming Events

Board Meetings as on 03/07/2026

A2Z Infra Engineering Limited	Financial Results
Arvind Limited	Fund Raising
Davangere Sugar Company Limited	Fund Raising
Nestle India Limited	Dividend
Tulsi Extrusions Limited	Financial Results
Viceroy Hotels Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 03/07/2026

Akums Drugs and Pharmaceuticals Limited	Dividend - Re 1 Per Sh/Spcl Dividend - Rs 2 Per Sh
Balaji Amines Limited	Dividend - Rs 11 Per Share
BF Investment Limited	Dividend - Rs 10 Per Share
Bharat Forge Limited	Dividend - Rs 6.50 Per Share
Biocon Limited	Dividend - Re 0.50 Per Share
Can Fin Homes Limited	Dividend - Rs 8 Per Share
Dalmia Bharat Sugar and Industries Limited	Dividend - Rs 1.50 Per Share
DCM Shriram Industries Limited	Dividend - Re 0.40 Per Share
Escorts Kubota Limited	Dividend - Rs 33 Per Share
Exide Industries Limited	Dividend - Rs 2 Per Share
Gloster Limited	Dividend - Rs 20 Per Share
Greenlam Industries Limited	Dividend - Re 0.40 Per Share
JSW Dulux Limited	Dividend - Rs 50 Per Share
Kirloskar Pneumatic Company Limited	Dividend - Rs 8.50 Per Share
Krishana Phoschem Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 2/- Per Share
Madhya Bharat Agro Products Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 2/- Per Share
Mahindra & Mahindra Limited	Dividend - Rs 33 Per Share
Mahindra Lifespace Developers Limited	Dividend - Rs 3.50 Per Share
Max Healthcare Institute Limited	Dividend - Rs 2 Per Share
Onward Technologies Limited	Dividend - Rs 8 Per Share
Raymond Realty Limited	Dividend - Rs 2 Per Share
Redington Limited	Dividend - Rs 6 Per Share
Rolex Rings Limited	Buy Back

Shriram Finance Limited	Dividend - Rs 6 Per Share
SKF India (Industrial) Limited	Dividend - Rs 10 Per Share
SKF India Limited	Dividend - Rs 40 Per Share
SML Mahindra Limited	Dividend - Rs 23.50 Per Share
Swaraj Engines Limited	Dividend - Rs 110 Per Share
Teamlease Services Limited	Buy Back
Tech Mahindra Limited	Dividend - Rs 36 Per Share
Thermax Limited	Dividend - Rs 14 Per Sh/Spcl Dividend - Rs 6 Per Sh
Union Bank of India	Dividend - Rs 5 Per Share
Welspun Enterprises Limited	Dividend - Rs 3 Per Share

(Source: NSE)

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