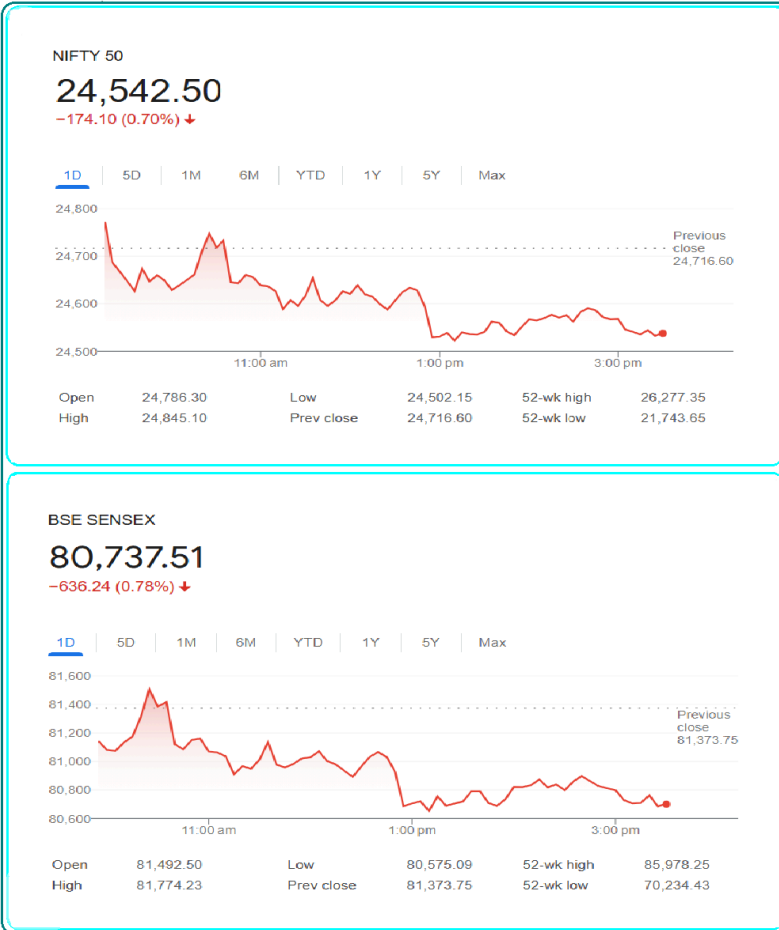


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24542.50	24716.60	-0.70%
S&P BSE SENSEX	80737.51	81373.75	-0.78%
NIFTY MID100	57517.10	57775.55	-0.45%
NIFTY SML100	18114.15	18095.55	0.10%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55599.95	55903.40	-0.54%

Market Wrap Up

- The headline equity benchmarks ended with significant losses today, declining for the third day in a row, as concerns over global trade tensions weighed on investor sentiment. Tensions flared after the U.S hiked tariffs on steel and aluminum, stoking fears for India exporters and global trade.
- The S&P BSE Sensex declined 636.24 points or 0.78% to 80,737.51. The Nifty 50 index dropped 174.10 points or 0.70% to 24,542.50. In the past three trading sessions, the Sensex and Nifty declined 1.1% and 1.17%, respectively. The S&P BSE Mid-Cap index fell 0.52% and the S&P BSE Small-Cap index shed 0.07%.
- Among the sectoral indices, the Nifty Realty index (up 1.20%), the Nifty Media index (up 0.54%) and the Nifty Metal index (down 0.07%) outperformed the Nifty 50 index. Meanwhile, the Nifty Private Bank index (down 1.17%), the Nifty Oil & Gas index (down 0.77%) and the Nifty Consumer Durables index (down 0.71%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **June** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **4696** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **PRESTIGE, DELHIVERY, FEDERALBNK**.
- Short** position build up for the **June** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.
- Unwinding** position for the **June** series has been witnessed in **DABUR, CESC**.

(Source: Capitaline F&O)

NIFTY AUTO	23268.70	23327.05	-0.25%
NIFTY FMCG	55460.80	55732.55	-0.49%
NIFTY IT	36814.90	37061.85	-0.67%
NIFTY METAL	9122.30	9128.55	-0.07%
NIFTY PHARMA	21354.20	21394.10	-0.19%
NIFTY REALTY	982.90	971.25	1.20%
BSE CG	70588.40	71210.90	-0.87%
BSE CD	57387.59	57712.24	-0.56%
BSE Oil & GAS	26738.76	26994.10	-0.95%
BSE POWER	6726.40	6828.55	-1.50%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	37446.81	37470.67	-0.06%
HANG SENG	23512.49	23157.97	1.53%
STRAITS TIMES	3894.38	3890.59	0.10%
SHANGHAI	3361.98	3347.49	0.43%
KOSPI	CLOSED	2698.97	-
JAKARTA	7044.82	7065.07	-0.29%
TAIWAN	21126.93	21002.71	0.59%
KLSE COMPOSITE	1503.25	1508.35	-0.34%
ALL ORDINARIES	8690.90	8637.50	0.62%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	116211.91	107705.36
NSE F&O	161447.90	152031.88

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2853.83

(Source: [NSE](#))

Corporate News

- **Maruti Suzuki India's** total production rose 1.38% to 195,882 units in May 2025 as against 193,207 units recorded in May 2024. Sequentially, the auto giant's total production jumped 8.84% as compared with 179,956 units produced in April 2025.
- **Larsen & Toubro** has bagged "significant" orders from Rajasthan government. L&T classifies orders worth between Rs 1,000 crore and Rs 2,500 crore.
- **HCL Technologies** announced a strategic partnership with UiPath, a leader in agentic automation, to accelerate agentic automation for UiPath customers globally.
- **Torrent Power Ltd** has signed a long-term sales and purchase agreement with BP Singapore Pte. Limited, a subsidiary of London-headquartered integrated energy company BP Plc, for the supply of up to 0.41 million metric tonnes per annum of LNG from 2027 to 2036.
- **Ichnos Glenmark** Innovation's ISB 2001 has shown promising results in treating relapsed or refractory multiple myeloma (RRMM), demonstrating a 79% overall response rate in a Phase 1 study. The drug targets two sites on the tumor cell and engages the body's T-cells, offering hope for patients who have exhausted other treatment options.
- **Jindal Stainless Limited** said that it has picked up a 33.64% equity stake in special purpose vehicle (SPV) for development of a 282 MW hybrid renewable energy project for its manufacturing operations.
- **BITES** said that it has emerged as the lowest bidder (L-1) in a quality-cum-cost based selection (QCBS) tender floated by Gujarat Urban Development Company (GUDCL) for a project worth Rs 28.50 crore.
- **Transrail Lighting** announced that it has secured fresh domestic and international orders worth Rs 534 crore.
- **Biocon** said that it has received an approval from the Drugs Controller General of India (DCGI), under the central drugs standard control organisation (CDSCO), for its Liraglutide drug substance.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
GRASIM	2552.40	2524.10	1.12%
SHRIRAMFIN	648.25	642.55	0.89%
M&M	3046.50	3025.90	0.68%
BAJAJ-AUTO	8563.00	8513.50	0.58%
CIPLA	1473.20	1470.20	0.20%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ADANI PORTS	1432.30	1468.00	-2.43%
ADANI ENT	2470.90	2518.80	-1.90%
BAJAJ FINSV	1991.90	2029.00	-1.83%
COAL INDIA	392.85	399.70	-1.71%
POWER GRID	288.25	293.05	-1.64%

(Source: [Moneycontrol](#))

- Desco Infratech announced that it has received multiple orders from **Bharat Petroleum Corporation**, **GAIL** Gas, and **Torrent** Gas aggregating to Rs 19.19 crore.

- NBCC (India)** posted consolidated net sales at Rs 4,642.55 crore in March 2025 up 15.36% from Rs. 4,024.50 crore in March 2024. Net profit at Rs. 175.92 crore in March 2025 up 29.27% from Rs. 136.08 crore in March 2024.
- Sobha** posted consolidated net sales at Rs 1,240.62 crore in March 2025 up 62.63% from Rs. 762.86 crore in March 2024. Net profit at Rs. 40.86 crore in March 2025 up 481.25% from Rs. 7.03 crore in March 2024.
- Texmaco Rail & Engineering** said that it has received an order worth Rs 122.31 crore from Mumbai Railway Vikas Corporation (MRVC).
- TVS Motor Company** has partnered with Kadam Mobility to deploy 500 electric three-wheelers by fiscal year 2026, focusing on metro and Tier 1 cities. Kadam Mobility will integrate TVS King EV MAX vehicles, known for their 179 km range and fast-charging, into its EV ecosystem.
- Medicamen Biotech** has received its first Abbreviated New Drug Application (ANDA) approval from the U.S. Food and Drug Administration (USFDA) for Bortezomib for injection 3.5 mg.

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

Global News

- Chins's Caixin General Manufacturing PMI unexpectedly declined to 48.3 in May 2025, down from April's 50.4.
- U.S. S&P Global Manufacturing PMI was revised lower to 52 in May 2025 from a preliminary of 52.3 but remained well above 50.2 in each of the previous two months.
- U.S. ISM Manufacturing PMI in the US fell to 48.5 in May 2025 from 48.7 in April.
- Eurozone consumer price inflation eased to 1.9% year-on-year in May 2025, down from 2.2% in April. Core inflation slipped to 2.3%, the lowest reading since January 2022.
- Eurozone unemployment rate edged down to 6.2% in April 2025, matching the record low set in December.
- Australia's current account deficit narrowed to AUD 14.7 billion in the first quarter of 2025 from an upwardly revised AUD 16.3 billion in the fourth quarter of 2024.

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

Economic News

- Crude Oil traded at US\$ 62.76/bbl (IST 17:00).
- INR weakened to Rs. 85.58 from Rs. 85.38 against each US\$ resulting in daily change of 0.23%.
- The central government has extra space in the fiscal deficit to push up expenditure by at least Rs. 0.8 trillion in FY2026 relative to the Budget Estimates (BE), as the higher GDP and RBI dividend payout provide room for it, according to a report by ICRA.
- The sugar industry is urging for revised ethanol procurement prices and extended blending targets due to a sharp decline in its contribution to the national ethanol program. They are advocating for accelerated promotion of Flex-Fuel Vehicles to boost ethanol demand.
- The Asian Development Bank (ADB) has pledged up to USD 10 billion towards India's urban transformation over the next five years, focusing on metro extensions and infrastructure development. This initiative aims to attract private investment through the Urban Challenge Fund and improve urban infrastructure in 100 cities.

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

Forthcoming Events

Board Meetings as on 04/06/2025

Allied Digital Services Limited	Financial Results
Deepak Builders & Engineers India Limited	Dividend
Arcotech Limited	Financial Results
Ashapura Intimates Fashion Limited	Financial Results
Hardwyn India Limited	Financial Results

(Source: NSE)

Corporate Actions as on 04/06/2025

Tata Consultancy Services Limited	Dividend - Rs 30 Per Share
Tata Motors Limited	Dividend - Rs 6 Per Share
Coforge Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 2/- Per Share
INOX India Limited	Dividend - Rs 2 Per Share
Seshasayee Paper and Boards Limited	Dividend - Rs 2.50 Per Share

(Source: NSE)

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : helpdesk@shriraminsight.com | www.shriraminsight.com |