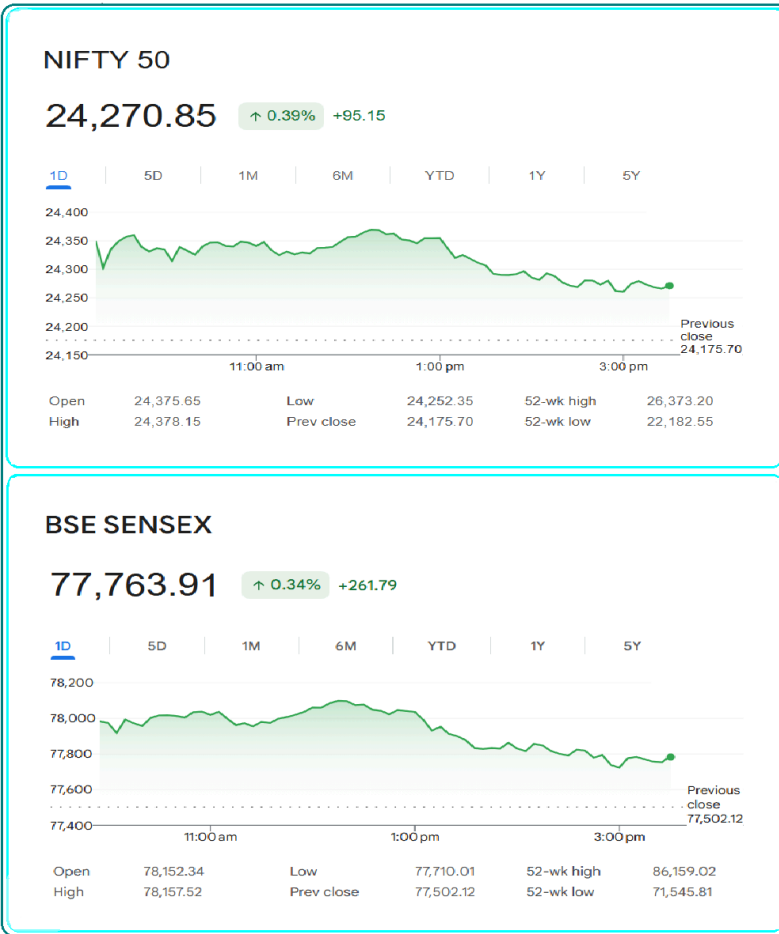


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24270.85	24175.70	<b>0.39%</b>
<b>S&amp;P BSE SENSEX</b>	77763.91	77502.12	<b>0.34%</b>
<b>NIFTY MID100</b>	62190.30	62307.90	<b>-0.19%</b>
<b>NIFTY SML100</b>	19175.10	19167.80	<b>0.04%</b>

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

## Market Wrap Up

- The headline equity benchmark ended with decent gains, extending gains for a third consecutive session. The rally was driven by positive global cues after weaker-than-expected US jobs data strengthened expectations of a Federal Reserve interest rate cut at its upcoming policy meeting. Realty and IT stocks led the gains, while buying interest remained broad-based across sectors. The Nifty settled above the 24,250 mark.
- The S&P BSE Sensex gained 261.79 points or 0.34% to 77,763.91. The Nifty 50 index jumped 95.15 points or 0.39% to 24,270.85. In the three consecutive trading sessions, the Sensex rallied 1.68% while the Nifty jumped 1.69%.
- The BSE 150 MidCap Index fell 0.25% and the BSE 250 SmallCap Index rose 0.09%.
- Among the sectoral indices, the Nifty Realty index (up 2.19%), the Nifty Healthcare index (up 1.80%) and the Nifty IT index (up 1.76%) outperformed the Nifty 50 index.
- Meanwhile the Nifty PSU Bank index (down 1.54%), the Nifty Media index (down 0.45%) and the Nifty Auto index (down 0.44%) 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 **1785** contracts at the end of the day.
- **Long** position build up for the **July** series has been witnessed in **RELIANCE, ICICIBANK, INFY**.
- **Short** position build up for the **July** series has been witnessed in **POWERINDIA, MARICO, BANKBARODA**.
- **Unwinding** position for the **July** series has been witnessed in **HDFCBANK, HCLTECH**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57938.50	58031.65	-0.16%
NIFTY AUTO	26988.10	27108.20	-0.44%
NIFTY FMCG	50096.40	50084.70	0.02%
NIFTY IT	27439.40	26965.05	1.76%
NIFTY METAL	12598.45	12503.90	0.76%
NIFTY PHARMA	25745.15	25308.90	1.72%
NIFTY REALTY	890.80	871.70	2.19%
BSE CG	78740.83	80559.20	-2.26%
BSE CD	60699.40	60891.21	-0.32%
BSE Oil & GAS	26201.08	26208.32	-0.03%
BSE POWER	7838.06	8029.89	-2.39%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	69744.07	68733.15	1.47%
HANG SENG	23350.03	23055.03	1.28%
STRAITS TIMES	5244.29	5217.15	0.52%
SHANGHAI	4043.64	4028.90	0.37%
KOSPI	8088.34	7648.09	5.76%
JAKARTA	5875.78	5744.56	2.28%
TAIWAN	46780.62	46744.16	0.08%
KLSE COMPOSITE	1679.05	1661.83	1.04%
All ORDINARIES	9048.30	8930.90	1.31%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	131653.67	122377.81
NSE F&O	137319.11	114999.04

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1355.33
NET SELL	-

(Source: [NSE](#))

## Corporate News

- HCL Technologies** signed an agreement with a Europe headquartered, Fortune Global 50 Firm to transform their global digital workplace and enterprise networks using Artificial Intelligence (AI).
- Tata Motors** has joined forces with Welspun Renewable Energy to develop an 86 MW wind-solar hybrid project. This initiative will power four of Tata Motors' manufacturing plants in Jharkhand, Uttar Pradesh, Uttarakhand, and Karnataka with clean electricity. The project aims to generate 200 million units of green power annually, significantly reducing carbon emissions and supporting the company's sustainability goals.
- Tata Motors** Jaguar Land Rover retail sales fell 15.3% year-on-year to 80,000 units in the first quarter of fiscal year 2027. The British luxury carmaker sold 79,300 units wholesale in the first quarter, a 9.2% decline from a year earlier.
- Zydu Lifesciences** signed memorandum of understanding (MoU) with Apollo Hospitals to introduce Shield, Multi-Cancer Detection (MCD) test available in India.
- HDFC Bank** is transforming into a tech powerhouse, developing its own AI platform, Neev, and a real-time fraud detection system. These in-house solutions, built by a dedicated engineering team, aim to combat rising banking frauds and enhance customer security. By investing in proprietary technology and engineering talent, the bank is positioning itself for future competition in the evolving financial landscape.
- Bank of Baroda** has agreed to a \$600 million settlement with administrators of the insolvent NMC Health Plc. The bank faced allegations of gross negligence, failing to conduct proper due diligence, and allowing fraudulent transactions without adhering to anti-money laundering and KYC norms. This payout, significantly exceeding its reported exposure, aims to resolve claims from NMC Health and its affiliates, stemming from a fraud discovered between 2012-2020.
- Nestle India** has recommended the special dividend of Rs 2 per equity Share (i.e. 200%).

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1139.00	1078.10	5.65%
MAXHEALTH	1153.40	1127.40	2.31%
APOLLOHOSP	8893.50	8696.00	2.27%
BAJAJFINSV	1895.60	1855.70	2.15%
DRREDDY	1374.10	1345.70	2.11%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
AXISBANK	1342.10	1362.60	-1.50%
M&M	3136.90	3175.40	-1.21%
SBIN	1040.00	1051.60	-1.10%
LT	4026.60	4059.40	-0.81%
TECHM	1410.10	1421.30	-0.79%

(Source: [Moneycontrol](#))

- Bank of Baroda, Bank of India, and Punjab National Bank** - are showing a significant gap between their credit and deposit growth, exceeding 350 basis points. While Bank of Baroda saw a sequential dip in both assets and liabilities, Bank of India and Punjab National Bank reported consistent expansion in their business figures year-on-year and quarter-on-quarter.
- Adani Group** is set to disrupt India's aluminium market with an \$11.5 billion venture, challenging Hindalco and Vedanta. The project, slated to add nearly 50% to national output in five years, leverages Adani's low-cost energy advantage. This significant expansion aims to meet rising domestic demand, with a substantial portion of bauxite sourced from Odisha, creating over 53,000 jobs.
- Coal India** announced that it has received a letter of award worth Rs 2,831.11 crore from Bundelkhand Saur Urja for setting up a 600 MW solar power project at Jalaun Solar Park in Uttar Pradesh.
- Indian Hume Pipe Company** has received Letter of Acceptance (LOA) with order value of Rs.738.61 crore (including GST) from Public Health Engineering Department (PHED), (Office of the Chief Engineer, JICA Funded Projects), Jaipur, Government of Rajasthan.
- Bajaj Finance's** new loans booked rose 20% year-on-year to 1.61 crore in Q1 FY27, compared with 1.35 crore in the corresponding quarter last year. The company reported that its customer franchise stood at 12.44 crore as of June 30, 2026, compared with 10.65 crore a year earlier, marking an addition of around 0.51 crore customers during Q1 FY27.
- Avenue Supermarts's** standalone revenue to Rs 18,343.49 crore in Q1 FY27 compared with Rs 15,932.12 crore posted in corresponding quarter last year. The total number of stores stood at 503 (including one store at Sanpada, Navi Mumbai, Maharashtra currently closed for customers due to reconstruction).
- Marsons** has received a purchase order worth Rs 17.93 crore from S.T. Electricals for supply of 10 MVA power transformers.
- Union Bank of India's** total gross advances rose 1.64% QoQ and 12.50% YoY to Rs 10,96,331 crore. Domestic advances increased 1.94% QoQ and 13.11% YoY to Rs 10,61,128 crore, while Retail, Agriculture and MSME (RAM) advances grew 1.61% QoQ and 11.56% YoY to Rs 6,08,095 crore.
- UCO Bank** reported a 21.33% year-on-year (YoY) increase in total advances to Rs 2.73 lakh crore as of 30 June 2026, compared with Rs 2.25 lakh crore as of 30 June 2025. On a sequential basis, total advances grew 3.80% quarter-on-quarter (QoQ) from Rs 2.63 lakh crore as of 31 March 2026.
- Central Bank of India** reported a 28.77% year-on-year (YoY) increase in its global gross advances to Rs 3,54,895 crore as of 30 June 2026, compared with Rs 2,75,595 crore as of 30 June 2025. The bank's total deposits rose 11.66% YoY to Rs 4,78,895 crore as of 30 June 2026, up from Rs 4,28,890 crore a year ago.
- Mahindra & Mahindra Financial Services** estimated the overall disbursement at approximately Rs 15,560 crore, YoY growth of around 21% (excluding finance lease). The NBFC's business assets jumped around 12% Yo Y at approximately Rs 1,37,300 crore. The Collection Efficiency (CE) is estimated at 95% for Q1 FY27 (In Q1 FY26, CE was 95%).

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

## Global News

- China RatingDog General Composite PMI eased to 53.6 in June 2026 from a three-month high of 54.0 in May. The services PMI declined to 54.1 in June 2026 from May's three-month high of 54.4.
- U.S. initial jobless claims slipped to 215,000 in the week ended June 27th, a decrease of 1,000 from the previous week's revised level of 216,000. Continuing claims rose by 2,000 to 1,814,000 in the third week of June.
- U.S. non-farm payroll employment rose by 57,000 jobs in June after jumping by 129,000 jobs in May. Private payrolls in the US increased by 49,000 in June 2026, the smallest gain in four months, following a downwardly revised 97,000 in May. The unemployment rate dropped to 4.2% in June 2026, down from 4.3% in May.
- U.S. factory orders slumped by 1.3% in May after spiking by an upwardly revised 5.3% in April.
- U.K. S&P Global Composite PMI fell to 49.3 in June of 2026 from 49.7 in May. The services PMI was revised slightly higher to 48.8 in June 2026 from May's reading of 49.3.
- Eurozone S&P Global Composite PMI was revised up to 50.0 in June 2026, from May's 48.5. The services PMI Business Activity Index rose to 49.4 in June of 2026 from 47.7 in the previous month.
- Germany's S&P Global Composite PMI was revised higher to 49.5 in June 2026. The services PMI was revised sharply higher to 48.6 in June 2026, up from May's final reading of 48.1.
- France's industrial production in France fell by 0.1% month-on-month in May 2026, following a 0.3% increase in the previous month. On an annual basis, industrial production rose 3.2% in May, following an upwardly revised 2.9% increase in the previous month.
- France's S&P Global Composite PMI rose to 47.2 in June 2026 from 44.9 in May. The services PMI rose to 46.8, revised down from the preliminary estimate of 47.4, in June 2026 from 44.3 in May.
- Japan's S&P Global Composite PMI Business Activity Index was revised higher to 52.8 in June 2026 from the flash estimate of 52.5. The services PMI Business Activity Index stood at 52.2 in June 2026, higher than 50.0 in the prior month.

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

## Economic News

- Crude Oil traded at US\$ 68.43/bbl (IST 17:00).
- INR strengthened to Rs. 95.23 from Rs. 95.40 against each US\$ resulting in daily change of 0.18%.
- India HSBC Composite PMI fell to 57.1 in June 2026 from May's 59.3. The services PMI was revised slightly higher to 57.4 in June 2026 from May's final six-month high of 58.9.
- India's electricity demand surged in June, pushing coal-fired power generation to a near three-year high. India's total

electricity generation in June rose 10.4% from a year ago to 178.31 billion kilowatt-hours. Coal-fired power generation rose about 14% year-on-year to 120.20 billion kWh in June, the highest since November 2023.

- India's palm oil imports in June fell to their lowest in 14 months, palm oil imports fell 10.5% from a month ago to 492,000 metric tons in June, the lowest level since April 2025.
- India holds an estimated \$5 trillion worth of gold in households and temples, yet continues to spend billions importing more every year.
- India has opened the door for four Chinese power equipment manufacturers with local factories to bid on crucial government power projects. This exemption, valid for two years, aims to bolster the nation's expanding transmission network and renewable energy goals. The move follows a January request from the power ministry and comes amid easing border tensions, though it's not set as a precedent for other firms.

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

## Forthcoming Events

### Board Meetings as on 04/07/2026

Supreme Infrastructure India Limited	Financial Results
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### Board Meetings as on 06/07/2026

Apollo Micro Systems Limited	Fund Raising
Ecos (India) Mobility & Hospitality Limited	Dividend
Embassy Developments Limited	Fund Raising
Mamata Machinery Limited	Dividend
SEPC Limited	Fund Raising

(Source: NSE)

### Corporate Actions as on 06/07/2026

DCM Shriram International Limited	Dividend - Re 0.40 Per Share
DJ Mediaprint & Logistics Limited	Dividend - Re 0.15 Per Share
Pilani Investment and Industries Corporation Limited	Dividend - Rs 9 Per Share
Sundaram Finance Limited	Dividend - Rs 24 Per Share

(Source: NSE)

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