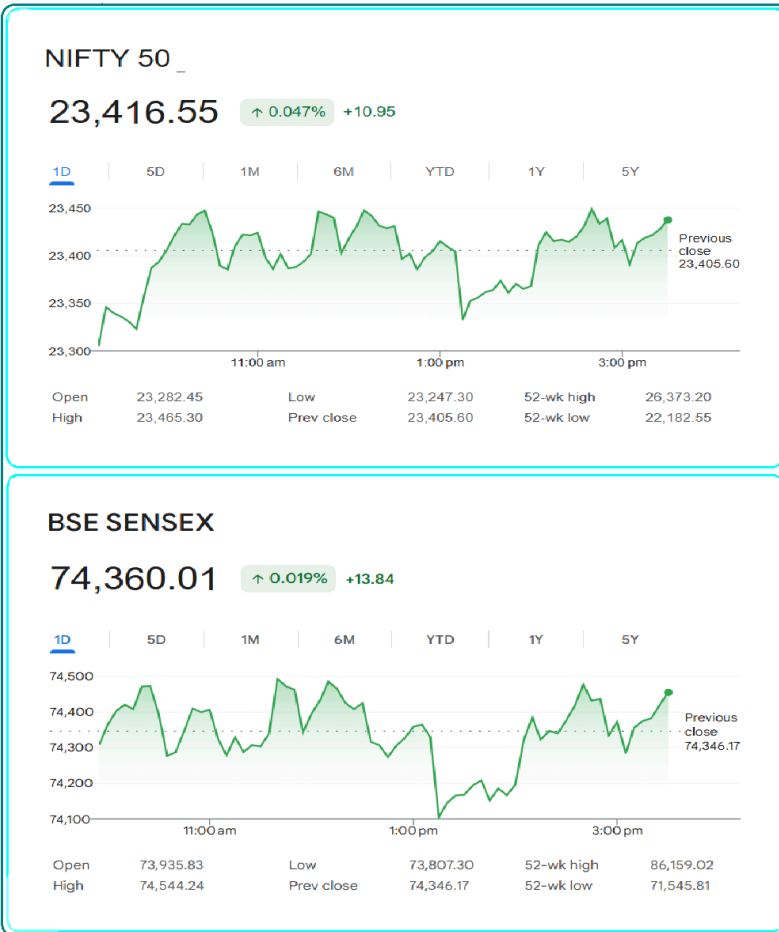


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23416.55	23405.60	0.05%
S&P BSE SENSEX	74360.01	74346.17	0.02%
NIFTY MID100	60966.65	60687.20	0.46%
NIFTY SML100	18121.05	18032.05	0.49%

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

Market Wrap Up

- The headline equity benchmarks ended with marginal gains after a roller-coaster trading day marked by sharp swings between gains and losses. Volatility remained elevated due to the weekly BSE F&O expiry, while caution prevailed amid geopolitical concerns in the Middle East and continued foreign institutional investor (FII) selling. Despite the volatility in benchmark indices, the broader market outperformed, with mid-cap and small-cap stocks attracting steady buying interest throughout the session. The Nifty settles above the 23,400 level.
- The S&P BSE Sensex rose 13.84 points or 0.02% to 74,360.01. The Nifty 50 index added 10.95 points or 0.05% to 23,416.55. The BSE 150 MidCap Index rose 0.46% and the BSE 250 SmallCap Index rallied 0.60%.
- Among the sectoral indices, the Nifty Media index (up 2.19%), the Nifty consumer durables index (up 2.18%) and the Nifty PSU Bank Index (up 0.41%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (down 0.73%), Nifty IT index (down 0.29%) and the Nifty chemicals index (down 0.07%) the 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 **11827** contracts at the end of the day.
- **Long** position build up for the **June** series has been witnessed in **SBIN, ICICIBANK**.
- **Short** position build up for the **June** series has been witnessed in **RELIANCE, BHARTIARTL, HDFCBANK, INFY**.
- **Unwinding** position for the **June** series has been witnessed in **TECHM, TATASTEEL**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54307.85	54185.95	0.22%
NIFTY AUTO	26144.35	26092.80	0.20%
NIFTY FMCG	48216.00	48123.95	0.19%
NIFTY IT	29300.60	29384.45	-0.29%
NIFTY METAL	13436.00	13535.20	-0.73%
NIFTY PHARMA	24177.95	24086.60	0.38%
NIFTY REALTY	764.60	762.60	0.26%
BSE CG	80155.56	79354.73	1.01%
BSE CD	58389.68	57279.38	1.94%
BSE Oil & GAS	26671.28	26521.29	0.57%
BSE POWER	8126.45	8093.13	0.41%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	67470.69	68402.13	-1.36%
HANG SENG	25253.40	25633.21	-1.48%
STRAITS TIMES	5067.53	5138.24	-1.38%
SHANGHAI	4057.78	4083.97	-0.64%
KOSPI	8639.41	8801.49	-1.84%
JAKARTA	5839.79	5941.07	-1.70%
TAIWAN	45677.46	46459.16	-1.68%
KLSE COMPOSITE	1683.26	1672.74	0.63%
ALL ORDINARIES	8916.90	9017.20	-1.11%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	128983.62	135352.15
NSE F&O	119930.49	170206.22

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4447.06

(Source: [NSE](#))

Corporate News

- Maruti Suzuki** has introduced India's first flex-fuel passenger car, the Wagon R. This technology allows vehicles to run on petrol or petrol-ethanol blends. It is seen as a significant step towards reducing crude oil imports. The move also aims to lower carbon emissions and enhance India's energy security. This innovation could unlock substantial benefits for the country.
- Tata Consultancy Services** announced a strategic partnership with Finland-based premium tyre manufacturer Nokian Tyres Plc.
- Rajesh Exports Limited** has denied allegations of revenue inflation made by SEBI. The company stated that the regulator's order is interim and its declared revenues are accurate. Rajesh Exports believes there is a communication gap and is providing all necessary documents to SEBI for clarification. SEBI's investigation uncovered evidence suggesting significant revenue inflation.
- Ceigall India** announced that its wholly owned subsidiary, Ceigall Infra Projects has entered into a definitive agreement to divest its stake in Ceigall Malout Abohar Sadhuwali Highways (CMASH) to Neo Infra Income Opportunity Fund.
- Persistent Systems** collaborated on an AI engineering talent initiative with Databricks and the Milwaukee School of Engineering (MSOE) to help strengthen the next generation of enterprise-ready AI talent.
- Hindalco Industries** is expanding its footprint for its new category of high-performance aluminium window systems to cater to India's evolving building and construction landscape. As part of this, the company today announced the launch of its flagship Eterna experience centre in Lajpat Nagar, New Delhi. It is also strengthening its manufacturing presence in North India with the Bilaspur manufacturing facility.
- Hero MotoCorp** unveiled its first flex-fuel motorcycles, the Splendor+ Flex Fuel and HF Deluxe Flex Fuel. The launch marks the entry of flex-fuel technology into India's mass-market 100cc motorcycle segment. The motorcycles can run on ethanol-blended fuels ranging

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TITAN	4231.00	4088.80	3.48%
ETERNAL	254.35	247.00	2.98%
COALINDIA	481.65	472.30	1.98%
CIPLA	1398.70	1375.20	1.71%
ADANIEN	2972.80	2925.60	1.61%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	1201.30	1222.60	-1.74%
BAJAJFINSV	1709.80	1734.40	-1.42%
HINDALCO	1125.60	1138.90	-1.17%
SBILIFE	1764.90	1784.20	-1.08%
ULTRACEMCO	10997.00	11101.00	-0.94%

(Source: [Moneycontrol](#))

- **Bharat Heavy Electricals** said it has signed a contract agreement with Dangote Petroleum Refinery & Petrochemicals Free Zone Enterprise for the execution of a project in Nigeria's Dangote Industries Free Zone.

from E20 to E85.

- **PhysicsWallah** said it will partner with multiple regulated non-banking financial companies (NBFCs) to provide education loans to students. The move comes shortly after PhysicsWallah announced an investment of around Rs 120 crore in its wholly owned subsidiary, FinZ Finance.
- **MSTC** and **MMTC** said that the Union Cabinet approved a Rs 9,585 crore scheme to replace old trucks and buses in the Delhi-NCR region.
- **Jain Irrigation Systems** announced the commissioning of a high-tech industrial-scale biochar facility with an annual production capacity of around 20,000 tonnes in Jalgaon, Maharashtra.
- **NBCC (India)** has secured two project management consultancy (PMC) assignments with a combined value of about Rs 45.5 crore. The company received an Rs 39.99 crore order from Canara Bank for the construction of a residential building at Plot No. 624/1617, Shimpoli Road, Borivali West, Mumbai. Separately, NBCC has been awarded a Rs 5.51 crore PMC contract by the Resident Commissioner, Andhra Pradesh Bhavan, for the upgradation of Bungalow No. 1, Janpath, the official residence of the Chief Minister of Andhra Pradesh.

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

Global News

- China's Reverse Repo Rate remained unchanged at 1.40% in April. Reverse Repo Rate in China averaged 2.46% from 2012 until 2026, reaching an all time high of 4.40% in July of 2013 and a record low of 1.40% in May of 2025.
- U.S. private businesses added a net 122,000 jobs in May 2026, a new high since January 2025, compared to a downwardly revised 105,000 in April.
- U.S. factory order surged 4.8% from the previous month to \$662.7 billion in April of 2026, extending the upwardly revised 1.8% increase in March.
- U.S. S&P Global Composite PMI stood at 51.5 in May 2026, down slightly from 51.7 in April. The services PMI eased to 50.7 in May of 2026 from 51 in the previous month.
- U.S. ISM Services PMI increased to 54.5 in May 2026 from 53.6 in April.
- Australia posted a trade surplus of AUD 1.79 billion in April 2026, shifting from a downwardly revised AUD 1.02 billion

deficit in the previous month.

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

Economic News

- Crude Oil traded at US\$ 94.38/bbl (IST 17:00).
- INR weakened to Rs. 95.80 from Rs. 95.72 against each US\$ resulting in daily change of 0.08%.
- The Indian government is set to introduce new rules for edible oil packaging. This move aims to standardize pack sizes, making it easier for consumers to compare prices. Manufacturers believe this will lead to fairer competition and better transparency. The initiative also focuses on sustainable packaging practices. Consumers will benefit from clearer choices and increased confidence in packaged edible oils.
- Indian consumers are increasingly concerned about jobs and the economy. This is leading many to reduce spending on non-essentials like dining and shopping. People are prioritizing savings and financial security. Despite these worries, travel plans remain strong, with many intending to take domestic and international holidays. Consumers are also planning for once-in-a-lifetime experiences.
- India 12.5% new tariff: Indian exporters are watching US tariff reviews closely, hoping that trade talks will protect their market share. A uniform tariff could hurt India's advantage as buyers shift from China. India's strong labour laws are expected to help in negotiations.
- Aviation Turbine Fuel prices will be capped by state-run oil companies. The government has approved a Rs. 10,000 crore support scheme. This aims to protect Indian airlines from higher global crude oil costs. Jet fuel prices are fixed at Rs. 115 per litre for airlines. This measure will help keep airfares affordable for passengers. The scheme will operate for 36 months.
- India's textile and apparel sector is poised for significant growth in Oman following the India-Oman Comprehensive Economic Partnership Agreement (CEPA). The pact grants immediate duty-free access on 945 textile and apparel lines, eliminating a 5% MFN duty. This move is expected to boost India's exports, valued at \$95.
- Elevated oil prices could slow India's economic growth to around 6%, according to former IMF official Gita Gopinath. She warned that prolonged West Asian tensions could further impact global growth and India's prospects. Gopinath emphasized supply-side reforms, renewable energy, and improving ease of doing business to boost investment and strengthen India's global supply chain role.
- The government's wheat procurement rose 17% to over 35 million tonne in the 2026-27 rabi marketing season, surpassing both the target of 34.5 MT and the previous year's procurement of 30 MT.
- The Asian Development Bank and Standard Chartered Bank have partnered to boost supply chain finance in India. Agreements include risk-sharing for USD transactions via GIFT City and a guarantee facility for rupee transactions, aiming to expand access for businesses and enhance trade flows.
- India's Ministry of Mines is preparing to introduce a new policy. This policy will offer incentives for processing lithium and nickel. The initiative has an estimated outlay of 30 billion rupees. This move is crucial for India's electric vehicle goals.

The nation aims for significant electric car and two-wheeler penetration by 2030.

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

Forthcoming Events

Board Meetings as on 05/06/2026

Hardwyn India Limited	Bonus
Mawana Sugars Limited	Dividend
Valecha Engineering Limited	Financial Results

(Source: NSE)

Corporate Actions as on 05/06/2026

Reliance Industries Limited	Dividend - Rs 6 Per Share
Cipla Limited	Dividend - Rs 13 Per Share
Bank of Baroda	Dividend - Rs 8.50 Per Share
BEML Limited	Interim Dividend - Rs 2.30 Per Share
HDFC Asset Management Company Limited	Dividend - Rs 54 Per Share
ICICI Prudential Life Insurance Company Limited	Dividend - Rs 1.65 Per Share
Wipro Limited	Buy Back
Jagran Prakashan Limited	Interim Dividend - Rs 7 Per Share & Special Dividend Rs 3 Per Share
JSW Energy Limited	Dividend - Rs 2 Per Share
Archean Chemical Industries Limited	Dividend - Rs 2.50 Per Share
Bank of Maharashtra	Dividend - Rs 1.20 Per Sh
E2E Networks Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Re 1/- Per Share
Ponni Sugars (Erode) Limited	Dividend - Rs 5 Per Share
Sanco Industries Limited	Merger
Spacenet Enterprises India Limited	Interim Dividend - Rs. 0.01 Per Sh
Vertoz Limited	Interim Dividend - Rs 0.10 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 |