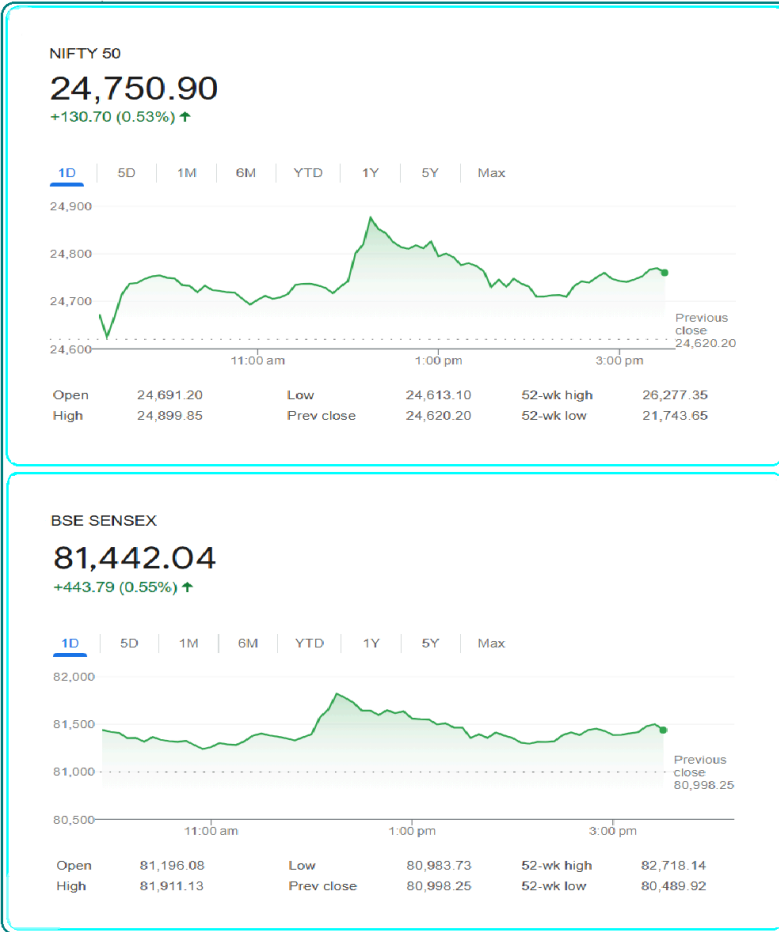


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24750.90	24620.20	0.53%
S&P BSE SENSEX	81442.04	80998.25	0.55%
NIFTY MID100	58303.00	57924.65	0.65%
NIFTY SML100	18432.60	18257.10	0.96%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55760.85	55676.85	0.15%

Market Wrap Up

- The headline equity benchmarks ended with decent gains today, supported by positive global sentiment, expectations of a rate cut in the upcoming RBI policy meeting later this week, and sustained foreign fund inflows. While investors await the policy outcome, they are also closely tracking bond markets, Brent crude trends, and global trade developments. The market was volatile due to the weekly expiry of the Nifty F&O series today. The Nifty settled above the 24,750 mark. The S&P BSE Sensex advanced 443.79 points or 0.55% to 81,442.04. The Nifty 50 index jumped 130.70 points or 0.53% to 24,750.90. In the past two trading sessions, the Sensex and Nifty jumped 0.87% and 0.85%, respectively. The S&P BSE Mid-Cap index rose 0.39% and the S&P BSE Small-Cap index added 0.65%.
- Among the sectoral indices, the Nifty Realty index (up 75%), the Nifty Pharma index (up 1.28%) and the Nifty Metal index (up 0.59%) outperformed the Nifty 50 index. Meanwhile, the Nifty PSU Bank index (down 0.58%), the Nifty Media index (down 0.23%) and the Nifty Auto index (down 0.11%) 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 **1893** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- Short** position build up for the **June** series has been witnessed in **SBIN**, **BAJFINANCE**, **BAJAJFINSV**.
- Unwinding** position for the **June** series has been witnessed in **ADANI PORTS**, **TATAPOWER**.

(Source: Capitaline F&O)

NIFTY AUTO	23306.20	23332.60	-0.11%
NIFTY FMCG	55632.45	55530.55	0.18%
NIFTY IT	37107.95	36938.10	0.46%
NIFTY METAL	9231.50	9177.40	0.59%
NIFTY PHARMA	21644.20	21371.70	1.28%
NIFTY REALTY	993.10	976.00	1.75%
BSE CG	71008.42	70713.45	0.42%
BSE CD	57650.76	57596.98	0.09%
BSE Oil & GAS	26874.77	26880.63	-0.02%
BSE POWER	6768.47	6747.84	0.31%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	37554.49	37747.45	-0.51%
HANG SENG	23906.97	23654.03	1.07%
STRAITS TIMES	3917.69	3903.88	0.35%
SHANGHAI	3384.10	3376.20	0.23%
KOSPI	2812.05	2770.84	1.49%
JAKARTA	7113.42	7069.04	0.63%
TAIWAN	21674.43	21618.09	0.26%
KLSE COMPOSITE	1518.12	1507.97	0.67%
ALL ORDINARIES	8768.60	8770.20	-0.02%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	117115.84	110840.02
NSE F&O	176640.52	118416.37

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	208.47

(Source: [NSE](#))

Corporate News

- **REC** has received approval from its board of directors to raise up to Rs. 1.55 Lakh Crore via the private placement of bonds or debentures. The company plans to execute the fundraising in multiple tranches. Additionally, this is subject to approval from shareholders in the ensuing general meeting.
- **Dr. Reddy's Laboratories** has partnered with Alvotech to co-develop and commercialize a biosimilar for pembrolizumab (Keytruda), a crucial cancer treatment with USD 29.5 billion in 2024 sales. The collaboration aims to expedite development and broaden global access to this biosimilar. Both companies will share development, manufacturing costs, and commercialization rights.
- **Gland Pharma** announced that its material arm Cenexi has received a final inspection report from France's drug regulator, Agence nationale de sécurité du médicament et des produits de santé (ANSM). The regulator observed 11 instances related to Good Manufacturing Practices (GMP) compliance. The inspection was carried out at the company's manufacturing facility situated in Fontenay.
- **Vedanta Ltd** is exploring biodiesel for its commercial vehicles in Jharsuguda, Odisha, and aims to fully decarbonize its light motor vehicle fleet by 2030. The company is also using biomass briquettes at its Lanjigarh refinery and BALCO smelter, and has introduced electric forklifts to reduce emissions. These initiatives reflect Vedanta's commitment to sustainable and responsible growth in the aluminium industry.
- **IndusInd Bank** expands its digital banking platform, 'INDIE', to over 15 million retail customers, integrating core banking services into a unified interface. The app features numberless debit cards, virtual single-use cards, and dynamic ATM PINs for enhanced security.
- **Central Bank of India** has acquired a 25.18% stake in Future Generali India Life Insurance Company Ltd for Rs. 57 crore through the insolvency resolution process. This acquisition of over 65 crore shares marks the bank's entry into the insurance sector. With this deal, Central Bank of India now holds a 25% stake.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ETERNAL	256.56	245.68	4.43%
DRREDDY	1290.60	1251.90	3.09%
TRENT	5673.00	5506.50	3.02%
POWERGRID	294.25	288.55	1.98%
ICICIBANK	1454.80	1431.00	1.66%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INDUSINDBK	803.20	814.35	-1.37%
TATACONSUM	1111.90	1124.40	-1.11%
AXISBANK	1159.00	1171.00	-1.02%
BAJAJFINSV	1944.00	1956.10	-0.62%
BAJFINANCE	8934.00	8987.00	-0.59%

(Source: [Moneycontrol](#))

- **Man Industries (India)** announced that it had secured a new export order worth Rs 1,150 crore from an international customer for the supply of various types of pipes.
- **RailTel Corporation of India** secured an order worth Rs 274.40 crore from the Motor Vehicles Department, Maharashtra.

- **CESC** said that its subsidiary, Purvah Green Power, has signed a framework agreement with Envision Energy India for the supply and commissioning of 1 GW wind turbine generators (WTGs).
- **Hindustan Aeronautics** has refuted media claims of its negotiations with General Atlantic (GE) over the local production of GE414 engines have been cancelled. The business called such reports factually incorrect and misleading.
- **Power Grid** has acquired MEL Power Transmission Limited (MPTL). The aggregate transaction value for this deal was Rs. 8.53 Crore. The company has acquired 10,000 equity shares under this deal.
- **Coal India's** environment friendly coal transportation grew by 34 percent year on-year in FY 2025 at 102.5 million tonnes (MTs). This was through 20 first mile connectivity (FMC) projects linked with the Indian Railway network. Comparatively, the same was 76.5 MTs in FY 2024 through 17 such projects.
- **Rama Steel Tubes** announced a strategic investment in the renewable energy sector through a 10% equity stake in a 225 MW solar power project under the Government of India's PM-KUSUM scheme.

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

Global News

- China Caixin General Composite PMI dropped to 49.6 in May 2025 from 51.1 in the previous month. The services PMI rose to 51.1 in May 2025, up from April's seven-month low of 50.7.
- U.S. ADP said private sector employment rose by 37,000 jobs in May after climbing by a downwardly revised 60,000 jobs in April.
- U.S. S&P Global Composite PMI was revised up to 53.0 in May 2025, above April's 19-month low of 50.6. The services PMI rose to 53.7 in May 2025, up from 50.8 in April.
- U.S. ISM said its services PMI fell to 49.9 in May from 51.6 in April.
- Eurozone industrial producer prices fell by 2.2% in April 2025, this followed a revised 1.7% drop in March. On an annual basis, producer price inflation eased sharply to 0.7% in April, down from 1.9% in March.

- Germany's factory orders rose 0.6% month-on-month in April, following a revised 3.4% rise in March.
- Australia's trade surplus in goods narrowed to AUD 5.41 billion in April 2025, down from a marginally revised AUD 6.89 billion in the previous month. Exports dropped 2.4% from the previous month to AUD 44.08 billion, reversing a downwardly revised 7.2% increase in March while imports grew by 1.1% to AUD 38.66 billion, rebounding from an upwardly revised 2.4% decline in the previous month.

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

Economic News

- Crude Oil traded at US\$ 62.96/bbl (IST 17:00).
- INR strengthened to Rs. 85.80 from Rs. 85.90 against each US\$ resulting in daily change of 0.12%.
- India's coal-fired electricity generation experienced a significant 9.5% drop in May, marking the fastest decline in five years, driven by decreased power demand and a surge in renewable energy output to a record high. Consequently, natural gas-fired power generation also plummeted, while the share of coal in the power mix reached its lowest level since June 2022.
- The Grid Controller of India has revised down its peak power demand target for June to 261 GW, a decrease from the earlier projection of 269 GW. This adjustment is attributed to the early arrival of the monsoon and unexpectedly mild temperatures, which are expected to dampen electricity consumption.
- India's domestic stainless steel consumption surged by 84% over the past five years, reaching 4.80 million tonnes in FY 2024-25, driven by infrastructure, railways, and construction sectors. The per capita consumption also increased from 2.5 kg to 3.4 kg during this period. Industry forecasts predict demand will reach 6.8 million tonnes by FY30, with per capita consumption rising to 4.5-5.
- India's foreign investment landscape has transformed since 2014. FDI equity inflows have surged, especially between 2019 and 2024. Government reforms like Make in India and Digital India have boosted investor confidence. The digital economy and manufacturing sectors have seen significant growth. India is emerging as a hub for clean technology and sustainable growth.

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

Forthcoming Events

Board Meetings as on 06/06/2025

BEML Limited	Dividend
Ethos Limited	Fund Raising
Housing & Urban Development Corporation Limited	Fund Raising
Ratnaveer Precision Engineering Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 06/06/2025

Bank of Baroda	Dividend - Rs 8.35 Per Share
Container Corporation of India Limited	Dividend - Rs 2 Per Share
Dr. Lal Path Labs Ltd.	Dividend - Rs 6 Per Share
HDFC Asset Management Company Limited	Dividend - Rs 90 Per Share
ICICI Lombard General Insurance Company Limited	Dividend - Rs 7 Per Share
IFGL Refractories Limited	Dividend - Re 1 Per Sh
Indiamart Intermesh Limited	Dividend - Rs 30 Per Sh/Spcl Dividend - Rs 20 Per Sh
JSW Energy Limited	Dividend - Rs 2 Per Share
Khadim India Limited	Demerger
L&T Technology Services Limited	Dividend - Rs 38 Per Share
Ramkrishna Forgings Limited	Interim Dividend - Re 1 Per Share
SIS LIMITED	Buy Back
Tata Steel Limited	Dividend - Rs 3.60 Per Share
Technocraft Industries (India) Limited	Interim Dividend - Rs 20 Per Share
Torrent Power Limited	Dividend - Rs 5 Per Share

(Source: NSE)

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