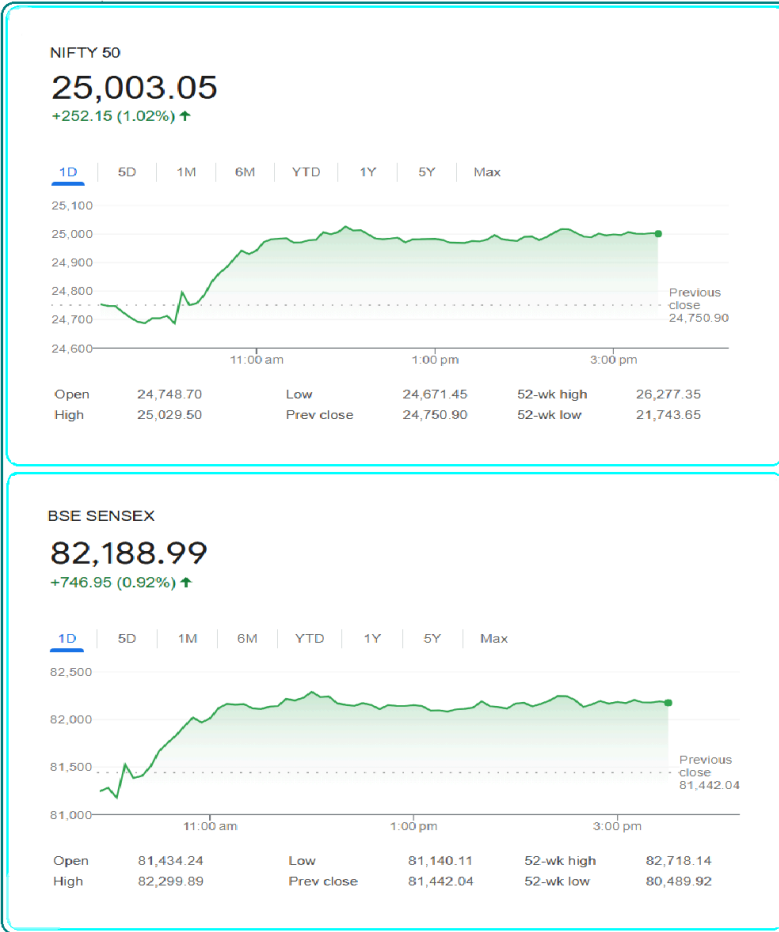


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25003.05	24750.90	1.02%
S&P BSE SENSEX	82188.99	81442.04	0.92%
NIFTY MID100	59010.30	58303.00	1.21%
NIFTY SML100	18582.45	18432.60	0.81%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56578.40	55760.85	1.47%

Market Wrap Up

- The headline equity benchmarks ended with major gains today, extending their rally for the third straight session in a row, after the RBI cut the repo rate by 50 bps to 5.50%, amid a favorable domestic environment. Looking ahead, the MPC will closely monitor evolving domestic and global conditions to guide future policy moves. Market participants are expected to track bond markets and global trade dynamics. The Nifty settled around the 25,000 level.
- The S&P BSE Sensex surged 746.95 points or 0.92% to 82,188.99. The Nifty 50 index jumped 252.15 points or 1.02% to 25,003.05. In the past three trading sessions, the Sensex and Nifty jumped 1.8% and 1.88%, respectively.
- The S&P BSE Mid-Cap index rose 0.91% and the S&P BSE Small-Cap index added 0.43%.
- Among the sectoral indices, the Nifty Realty index (up 4.68%), the Nifty Metal index (up 1.90%) and the Nifty Private Bank index (up 1.79%) outperformed the Nifty 50 index. Meanwhile, the Nifty Media index (down 1.14%), the Nifty Pharma index (up 0.19%) and the Nifty FMCG index (up 0.31%) 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 **443** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **LT, SBIN, ICICIBANK, HDFCBANK, INFY**.
- Short** position build up for the **June** series has been witnessed in **RELIANCE, BHARTIARTL, DABUR**.
- Unwinding** position for the **June** series has been witnessed in **TATAPOWER, ETERNAL, TATASTEEL**.

(Source: Capitaline F&O)

NIFTY AUTO	23661.30	23306.20	1.52%
NIFTY FMCG	55802.70	55632.45	0.31%
NIFTY IT	37294.85	37107.95	0.50%
NIFTY METAL	9406.45	9231.50	1.90%
NIFTY PHARMA	21684.40	21644.20	0.19%
NIFTY REALTY	1039.60	993.10	4.68%
BSE CG	70797.70	71008.42	-0.30%
BSE CD	58399.68	57650.76	1.30%
BSE Oil & GAS	27079.74	26874.77	0.76%
BSE POWER	6821.34	6768.47	0.78%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	37741.61	37554.49	0.50%
HANG SENG	23792.54	23906.97	-0.48%
STRAITS TIMES	3934.29	3917.69	0.42%
SHANGHAI	3385.36	3384.10	0.04%
KOSPI	CLOSED	2812.05	-
JAKARTA	CLOSED	7113.42	-
TAIWAN	21660.66	21674.43	-0.06%
KLSE COMPOSITE	1516.79	1518.12	-0.09%
ALL ORDINARIES	8741.90	8768.60	-0.30%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	132540.83	117115.84
NSE F&O	212557.18	176640.52

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1009.71
NET SELL	-

(Source: [NSE](#))

Corporate News

- **NTPC's** group installed generation capacity has reached 80,265 MW following the commencement of commercial operations of 110.25 MW from the Khavda solar project by its subsidiary, NTPC Renewable Energy. This Khavda-I Solar PV Project, with a total capacity of 1255 MW, marks a significant step for NTPC Green Energy, a subsidiary of NTPC Ltd.
- **JSW Energy** has launched a 281 MW renewable energy project in Maharashtra. The project includes 215 MW of solar and 66 MW of wind capacity. JSW Renew Energy Three has signed a power purchase agreement with Adani Electricity Mumbai. The agreement is for 250 MW of wind capacity for 25 years.
- **Dr. Reddy's Laboratories** and Alvotech are collaborating to develop, manufacture, and commercialize a biosimilar version of Keytruda, a highly successful cancer drug. This partnership aims to provide more affordable treatment options globally as Merck's patents begin to expire around 2028. The collaboration will enhance Dr.
- **Wockhardt's** new antibiotic, Zaynich, targeting gram-negative infections, anticipates a significant USD 7 billion market in the US and Europe. Following a successful pre-NDA meeting with the USFDA, the company plans to file for approval this quarter, aiming for a launch in FY27.
- **GAIL (India) Limited** has successfully berthed and discharged its first LNG vessel at the Dabhol LNG Terminal following the completion of the landmark Breakwater Project. The vessel, GAIL Bhuwan, was received on 02 June 2025.
- **Praj Industries** secured an international assignment from Enersur SA, one of Paraguay's leading renewable energy firms, to develop a fully integrated biorefinery project in the South American nation.
- **Brigade Enterprises's** wholly owned subsidiary, Brigade Tetrarch has announced the incorporation of a Limited Liability Partnership (LLP) named Auraterra Developers LLP.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	688.25	651.45	5.65%
BAJFINANCE	9371.50	8934.00	4.90%
JSWSTEEL	1004.90	968.75	3.73%
AXISBANK	1194.60	1159.00	3.07%
MARUTI	12462.00	12126.00	2.77%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
HDFCLIFE	755.10	761.60	-0.85%
BEL	390.70	393.50	-0.71%
BHARTIARTL	1870.20	1878.80	-0.46%
TATASTEEL	157.49	157.97	-0.30%
SUNPHARMA	1679.20	1683.10	-0.23%

(Source: [Moneycontrol](#))

- **Imagicaaworld Entertainment** said that it has entered into a facility agreement with HDFC Bank for Rs 275 crore to fund the acquisition of its Park Business Undertaking from Giriraj Enterprises.
- **Intellect Design Arena** said that it has secured a large deal from a leading South African Bank for nine-country rollout of eMACH.ai Digital Engagement Platform (DEP).
- **Karur Vysya Bank** has revised the Marginal Cost of Funds Based Lending Rates of the Bank with effect from 07 June 2025 as under: Overnight MCLR - 9.35%, One month MCLR - 9.50%, Three month MCLR - 9.65%, Six month MCLR - 9.80%, One year MCLR - 9.80%.
- **KPI Green Energy** signed three strategic Memoranda of Understanding (MoUs) with Delta Electronics to bolster India's clean energy ecosystem.

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

Global News

- U.S. initial jobless claims climbed to 247,000 in the week ended May 31st, an increase of 8,000 from the previous week's revised level of 239,000. Continuing claims edged down by 3,000 to 1.904 million in the week ended May 24th.
- U.S. trade deficit narrowed to \$61.6 billion in April from a revised \$138.3 billion in March.
- The European Central Bank slashed its interest rates by 25 basis points. The Governing Council, led by ECB President Christine Lagarde, lowered the deposit facility rate by a quarter basis point to 2.0%. The refinancing rate was cut to 2.15% and the marginal lending rate to 2.40%.
- Eurozone economy grew by 0.6% in the first quarter of 2025, doubling the earlier estimate of 0.3%. The economy expanded 1.5% year-on-year in the first quarter of 2025. It follows a 1.2% rise in Q4 2024.
- Eurozone retail sales rose by 0.1% month-over-month in April 2025, following a revised 0.4% increase in March. On an annual basis, retail trade growth quickened to a six-month high of 2.3% in April, from an upwardly revised 1.9% in March.
- Germany's trade surplus dropped sharply to EUR 14.6 billion in April 2025, down from an upwardly revised EUR 21.3 billion in March.
- Germany's industrial production fell by 1.4% month-over-month in April 2025, reversing a downwardly revised 2.3% increase in March. On a yearly basis, output declined by 1.8%, following a 0.7% decrease in March.
- France's trade deficit widened to EUR 8 billion in April 2025 from an upwardly revised EUR 6.3 billion in March.

- France recorded a current account deficit of EUR 4.1 billion in April 2025, reversing from a EUR 1 billion surplus in the previous month.
- French industrial production unexpectedly declined by 1.4% month-over-month in April 2025, reversing a downwardly revised 0.1% gain in March. On a yearly basis, industrial production fell by 0.8%.

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

Economic News

- Crude Oil traded at US\$ 63.32/bbl (IST 17:00).
- INR strengthened to Rs. 85.64 from Rs. 85.90 against each US\$ resulting in daily change of 0.19%.
- The Reserve Bank of India (RBI) unexpectedly lowered its key repo rate by 50 bps to 5.50% at its May meeting. The RBI also reduced the Standing Deposit Facility (SDF) rate by 50 bps to 5.25%, and the Marginal Standing Facility (MSF) rate and the Bank Rate to 5.75%. In addition, the central bank slashed the CRR by 100 bps to 3%, following a 50 bps cut last December. Reverse Repo Rate remained unchanged at 3.35% in May.
- India's passenger vehicle retail sales witnessed 3% on-year decline in May, according to FADA. The passenger vehicle registrations last month stood at 3,02,214 units, as compared to 3,11,908 units in May 2024. Two-wheeler retail sales rose 7% year-on-year in May at 16,52,637 units, as against 15,40,077 units in the year-ago period. Commercial vehicle retail sales declined 4% year-on-year to 75,615 units in May. Three-wheeler registrations increased 6% year-on-year to 1,04,448 units in May.
- India's foreign exchange reserves stood at \$691.5 billion as of May 30, down \$1.2 billion from the previous week and \$13.4 billion below the September 2024 peak.
- Indian tea prices have surged by 18% in the first four months of this year. This is due to high demand from Russia, Iran, Iraq, and the UAE. Exports are expected to remain strong. Major consumer goods firms are increasing purchases. Auctioneers anticipate prices to stay firm. Packet tea sellers are hesitant to raise prices for local consumers.

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

Forthcoming Events

Board Meetings as on 07/06/2025

Hardwyn India Limited

Financial Results

Board Meetings as on 09/06/2025

Simbhaoli Sugars Limited

Financial Results

(Source: NSE)

Corporate Actions as on 09/06/2025

NELCO Limited

Dividend - Re 1 Per Share

(Source: NSE)

DISCLAIMER

This document has been prepared by Shriram Insight Share Brokers Ltd. and is meant for sole use by the recipient and not for circulation. This document is not to be reported or copied or made available to others. The information contained herein is from sources believed reliable. It should not be considered as an offer to sell or a solicitation to buy any security or as an official confirmation of any transaction. We do not represent that it is accurate or complete and it should not be relied upon as such. This document is prepared for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The investments discussed or recommended in this report may not be suitable for all investors. Shriram Insight Share Brokers Ltd. Stock Recommendation Service is a general recommendation service and is not to be construed as an individual investor-specific Portfolio Management and Advisory Service.

The user assumes the entire risk of any use made of this information. Each recipient of this document should arrive at an independent evaluation of an investment in the securities of companies referred to in this document and should consult their own advisors to determine the merits and risks of such an investment.

Shriram Insight Share Brokers Ltd. shall not be responsible for any loss or liability incurred to the user as a consequence of his or any other person on his behalf taking any investment decisions based on the information, recommendations, research reports, analysis, quotes, etc. provided on the web site.

Shriram Insight Share Brokers Ltd shall not be liable for errors, omissions or typographical errors, disruption delay, interruption, failure, deletion or defect of/in the Service provided by it.

All Users of the Service in countries other than India understand that by using the Service, they may be violating the local laws in such countries. If the User chooses to access the Service from outside India, he shall be responsible for compliance with foreign and local laws.

EQUITIES | DERIVATIVES | COMMODITIES | DP SERVICES | MUTUAL FUNDS | RESEARCH

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 |