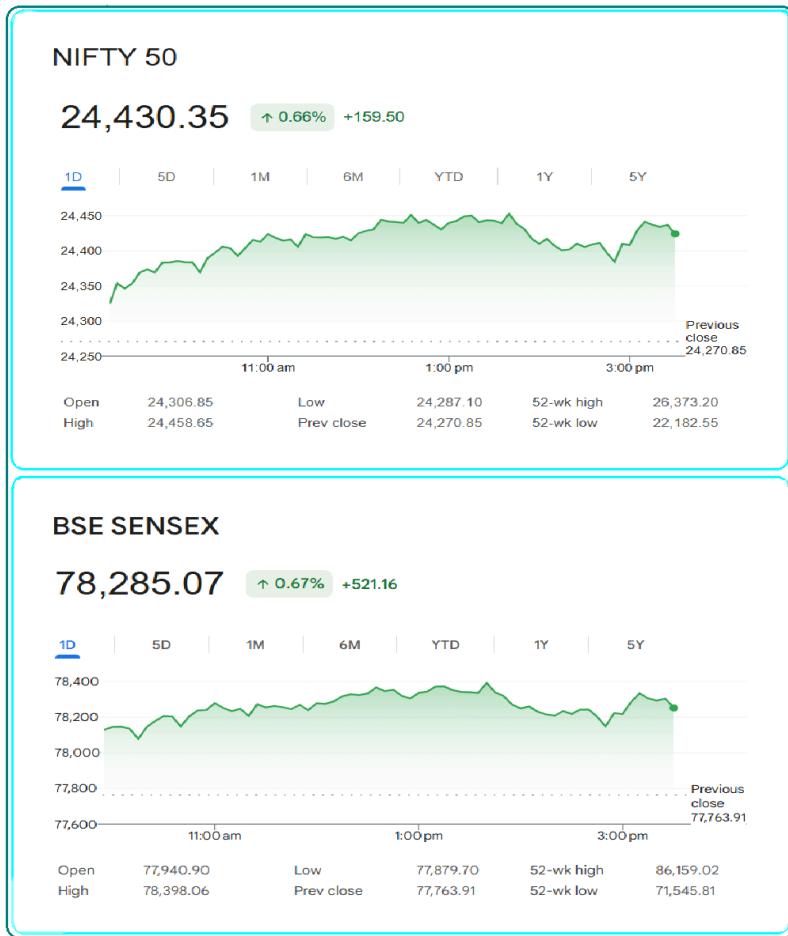


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24430.35	24270.85	0.66%
S&P BSE SENSEX	78285.07	77763.91	0.67%
NIFTY MID100	62471.50	62190.30	0.45%
NIFTY SML100	19319.10	19175.10	0.75%

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

Market Wrap Up

- The domestic equity benchmarks ended sharply higher, extending their winning streak to a fourth consecutive session, supported by gains in heavyweight banking stocks, easing crude oil prices, and sustained foreign institutional investor (FII) inflows. Positive global cues and optimism over healthy first-quarter business updates from lenders further boosted investor sentiment, with the Nifty closing comfortably above the 24,400 mark.
- The S&P BSE Sensex jumped 521.16 points or 0.67% to 78,285.07. The Nifty 50 index rose 159.50 points or 0.66% to 24,430.35. In the four consecutive trading sessions, the Sensex rallied 2.36% while the Nifty jumped 2.36%. The BSE 150 MidCap Index gained 0.47% and the BSE 250 SmallCap Index added 0.37%.
- Among the sectoral indices, the Nifty Realty index (up 1.81%), the Nifty Consumer Durables index (up 1.48%) and the Nifty Auto Index (up 1.36%) outperformed the Nifty 50 index. Meanwhile, the Nifty Media index (down 0.95%), Nifty PSU Bank index (down 0.88%) and the Nifty IT Index (down 0.59%) the 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 **3790** contracts at the end of the day.
- **Long** position build up for the **July** series has been witnessed in **RELIANCE, ONGC, ICICIBANK, HDFCBANK, INFY**.
- **Short** position build up for the **July** series has been witnessed in **BAJFINANCE, BAJAJFINSV, TCS, HCLTECH**.
- **Unwinding** position for the **July** series has been witnessed in **SBIN, WIPRO**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	58291.50	57938.50	0.61%
NIFTY AUTO	27353.95	26988.10	1.36%
NIFTY FMCG	50196.35	50096.40	0.20%
NIFTY IT	27276.45	27439.40	-0.59%
NIFTY METAL	12722.45	12598.45	0.98%
NIFTY PHARMA	25866.25	25745.15	0.47%
NIFTY REALTY	906.95	890.80	1.81%
BSE CG	79681.39	78740.83	1.19%
BSE CD	61419.38	60699.40	1.19%
BSE Oil & GAS	26426.01	26201.08	0.86%
BSE POWER	7878.04	7838.06	0.51%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	69737.69	69744.07	-0.01%
HANG SENG	23616.32	23350.03	1.14%
STRAITS TIMES	5259.81	5244.29	0.30%
SHANGHAI	4041.24	4043.64	-0.06%
KOSPI	8051.33	8088.34	-0.46%
JAKARTA	5916.07	5875.78	0.69%
TAIWAN	46556.39	46780.62	-0.48%
KLSE COMPOSITE	1683.53	1679.05	0.27%
ALL ORDINARIES	9037.00	9048.30	-0.12%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	112696.35	131653.67
NSE F&O	121632.21	137319.11

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	243.03
NET SELL	-

(Source: [NSE](#))

Corporate News

- HDFC Bank** reported its business update for the quarter ended 30 June 2026. For the quarter ended 30 June 2026, average advances under management (including interbank participation certificates, bills rediscounted, and securitization/assignment) increased 10.8% year-on-year (YoY) and 2.5% quarter-on-quarter (QoQ) to Rs 30,38,600 crore. Average deposits increased 13.3% YoY and 5.6% QoQ to Rs 30,11,400 crore. Average CASA deposits stood at Rs 9,57,000 crore, up 11.2% YoY and 4.2% QoQ, while average time deposits rose 14.3% YoY and 6.3% QoQ to Rs 20,54,400 crore.
- Axis Bank** reported gross advances stood at Rs 12,72,900 crore as of 30 June 2026, reflecting a 2.3% quarter-on-quarter (QoQ) increase and an 18.8% year-on-year (YoY) growth, indicating sustained credit demand across segments.
- Indian Oil Corp** and **Hindustan Petroleum Corp** have collectively secured approximately 7 million barrels of crude oil through recent tenders. Indian Oil acquired various grades from Angola and Nigeria, while HPCL purchased Brazilian Tupi crude. These significant purchases are slated for delivery between August and September, bolstering India's energy reserves.
- Ashok Leyland** has joined forces with Rosmerta Recycling to streamline the scrapping of old commercial vehicles across India. This partnership will offer customers a hassle-free process, including deregistration support, at authorized facilities. The initiative aligns with government programs to modernize fleets, reduce pollution, and encourage the adoption of newer, eco-friendly vehicles, providing customers with benefits like discounts and tax waivers.
- Glenmark Pharmaceuticals** has launched a generic version of Olanzapine injection in the United States, offering a treatment for schizophrenia and bipolar disorder. This move by its US arm, Glenmark Pharmaceuticals Inc., introduces a bioequivalent alternative to Zyprexa intramuscular injection. The company aims to expand its injectable offerings and bolster its presence in the institutional market, targeting a segment with significant annual sales.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HDFCBANK	829.85	801.05	3.60%
HINDALCO	980.40	953.20	2.85%
BAJAJ-AUTO	10036.50	9785.50	2.57%
ONGC	243.90	237.84	2.55%
M&M	3201.20	3136.90	2.05%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
KOTAKBANK	381.30	396.75	-3.89%
MAXHEALTH	1132.50	1153.40	-1.81%
TCS	2057.60	2093.50	-1.71%
COALINDIA	432.35	438.70	-1.45%
BAJAJFINSV	1870.70	1895.60	-1.31%

(Source: [Moneycontrol](#))

- Gautam **Adani's** \$11.5 billion aluminium joint venture with IHC marks his biggest bet yet on India's industrial future. Rather than challenging Hindalco and Vedanta directly, Adani is targeting soaring aluminium demand driven by manufacturing, renewable energy and infrastructure, aiming to build a fully integrated metals business and reshape India's aluminium industry.
- Granules India** has secured sole first-to-file (FTF) status for its abbreviated new drug application (ANDA) for sodium oxybate extended-release for oral suspension.
- Colgate-Palmolive India** is prioritizing rural market expansion, innovation, and digital transformation to boost growth. The company aims to reach more rural households and introduce science-backed products in urban areas. With a focus on data analytics and AI, Colgate-Palmolive is enhancing its value chain and strengthening its presence across all retail channels. Despite facing challenges, the company anticipates continued momentum driven by an improving demand environment and strong execution.
- Oberoi Realty** has launched its luxury housing project in Gurugram, achieving gross bookings of Rs 8,109 crore. The project, known as 'Three Sixty North,' located on the prestigious Golf Course Extension Road, has experienced exceptional demand, with 832 units sold in its initial phase. This extraordinary performance highlights the brand's successful entry into the Delhi-NCR market, with projected revenues soaring to Rs 16,000 crore.
- Enviro Infra Engineers** announced that it has secured two prestigious hybrid annuity model (HAM) projects from Uttar Pradesh Jal Nigam (Rural). The aforesaid contract has been awarded under the Government of India's flagship Namami Gange Programme. The combined order value stands at Rs 256.92 crore.
- Sunsure Energy** has secured a significant Rs 262 crore financing for its 75 MWp open-access solar project in Tamil Nadu. Dutch development bank FMO is leading the funding, with Axis Bank contributing approximately Rs 71 crore. This marks FMO's debut in India's Group Captive C&I renewable energy sector, aiming to power commercial and industrial clients with clean energy.
- Delhi High Court has halted Ahmedabad-based **Finecure Pharmaceuticals** from producing and selling drugs with names similar to Sun Pharma's 'Pantocid'. The court permitted Finecure to sell existing stock of 'Pantopacid' within four months, provided an affidavit detailing the inventory is filed. This decision overturns a previous ruling that had refused to grant an injunction against Finecure, highlighting significant sales disparities between the two companies.

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

Global News

- Eurozone producer prices increased 0.2% month-over-month in May 2026, following an upwardly revised 0.7% rise in April. On an annual basis, producer prices advanced 5.9% in May.
- Eurozone real retail sales rose by 0.2% from the previous month in May of 2026, rebounding from the revised 0.3% drop in the earlier period. From the previous year, retail sales volumes were 1.6%.
- Eurozone Sentix investor confidence index shrank from negative 13.4 in June to negative 3.1 in July.
- Germany's factory orders rose 1.9% mom in May 2026, rebounding from a downwardly revised 3.2% drop in April.

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

Economic News

- Crude Oil traded at US\$ 68.66/bbl (IST 17:00).
- INR weakened to Rs. 95.40 from Rs. 95.23 against each US\$ resulting in daily change of 0.18%.
- India's passenger vehicle sales stood at 4,10,853 units, recording an annual jump of 28.63% in June, according to FADA. The autodealers body reported that the total automobile industry retailed 25,57,234 units with a 21.83% growth in June with tractors recording 25.31% growth, two-wheelers at 21.22%, commercial vehicles at 16.88% and three-wheelers at 16.21%. Passenger vehicle sales in rural areas recorded a robust annual growth of 35.09%, as compared to urban growth of 24.67%. Alternative fuel vehicles - CNG, hybrid and electric vehicles (EV) combined recorded a 40.35% growth, crossing the 40% mark for the first time. Under commercial vehicle sales, rural areas grew 21.63% annual while urban areas posted a growth of 12.75% as goods-movement demand continued to broaden beyond the metros. For the July-September period, 66.17% dealers expect growth while only 3.98% expect de-growth in the sector.
- Prime Minister Modi's Australia visit is set to feature a significant uranium supply pact, bolstering India's nuclear power ambitions. Discussions will also cover critical minerals, cybersecurity, and clean energy. This follows a decade-old framework and aims to deepen economic ties, building on the landmark ECTA trade agreement which has already boosted bilateral trade to \$54.4 billion.
- India and Russia are targeting \$50 billion in mutual investments by 2030, focusing on joint ventures in advanced manufacturing, critical minerals, and green technology. A recent meeting in Moscow saw both nations agreeing to encourage private sector exploration and collaboration. India highlighted its cost-effective skilled workforce and investment-friendly reforms, while the "Making in Russia for India" model was also promoted to boost bilateral industrial ties.
- India and Israel's new investment pact is now active, aiming to boost trade beyond \$1 billion by offering quicker dispute resolution and enhanced investor protection. This agreement, signed in September 2025, allows a three-year window for domestic legal remedies before international arbitration, while safeguarding India's policy-making autonomy. It covers a

broad range of investments and replaces a previous accord.

- India is intensifying its watch on glufosinate imports from China, a crucial herbicide. Authorities are investigating if Chinese exporters are trying to bypass anti-dumping duties by adjusting prices. This move aims to protect domestic manufacturers. Meanwhile, anti-dumping duties on butyl alcohol from the US, Malaysia and South Africa have been extended.
- India's ambassador to China, Vikram Doraiswami, stressed the importance of expanding access to Chinese markets for Indian pharmaceutical companies and encouraging Chinese investments in India to bolster diplomatic relations. He pointed out India's strengths within the pharmaceutical industry and displayed optimism for increased export opportunities to China. Doraiswami also referred to India's recent policy changes as significant steps towards normalizing economic interactions with China.
- India holds an estimated \$5 trillion worth of gold in households and temples, yet continues to spend billions importing more every year. As pressure on the rupee and trade deficit mounts, the government is considering reviving the Gold Monetisation Scheme by involving jewellers to unlock idle gold and turn dormant household wealth into productive economic capital.
- India's foreign exchange reserves experienced a significant dip of \$5.65 billion, reaching \$666.93 billion by June 26, 2026. This follows a prior week's gain. The primary driver of this decline was a reduction in foreign currency assets and a notable decrease in gold reserves. Special Drawing Rights and India's IMF position also saw minor contractions.

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

Forthcoming Events

Board Meetings as on 07/07/2026

Orbit Exports Limited	Buyback
Rashtriya Chemicals and Fertilizers Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 07/07/2026

Cera Sanitaryware Limited	Dividend - Rs 75 Per Share
Dodla Dairy Limited	Dividend - Rs 5 Per Share
JSW Steel Limited	Dividend - Rs 7.10 Per Share
Sun Pharmaceutical Industries Limited	Dividend - Rs 5 Per Share
TSF INVESTMENTS LIMITED	Dividend - Rs 4.45 Per Share

(Source: NSE)

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