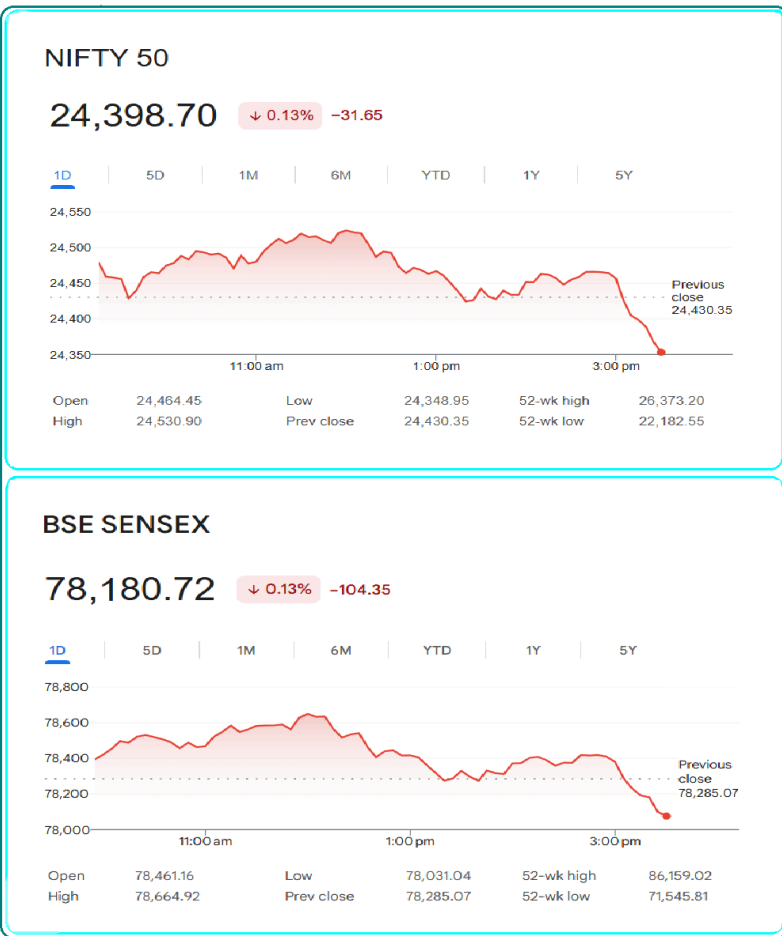


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24398.70	24430.35	-0.13%
S&P BSE SENSEX	78180.72	78285.07	-0.13%
NIFTY MID100	62285.30	62471.50	-0.30%
NIFTY SML100	19213.40	19319.10	-0.55%

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

Market Wrap Up

- The headline equity indices ended with minor losses, snapping a four-day winning streak, as profit booking emerged after fresh strikes between the US and Iran pushed up crude oil prices, weighing on investor sentiment. The Nifty ended below the 24,400 level.
- The S&P BSE Sensex declined 104.35 points or 0.13% to 78,180.72. The Nifty 50 index lost 31.65 points or 0.13% to 24,398.70. In the past four consecutive trading sessions, the Sensex rallied 2.34% while the Nifty jumped 2.35%.
- The BSE 150 MidCap Index shed 0.18% and the BSE 250 SmallCap Index fell 0.76%.
- Among the sectoral indices, the Nifty IT index (up 2.43%), the Nifty Consumer Durables index (up 0.89%) and the Nifty FMCG Index (up 0.06%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Realty index (down 1.58%), Nifty Metal index (down 1.10%) and the Nifty Chemical Index (down 0.91%) the underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **July** series futures witnessed an unwinding of **short** position. Open Interest has been decreased by **2503** contracts at the end of the day.
- **Long** position build up for the **July** series has been witnessed in **BAJFINANCE, TITAN**.
- **Short** position build up for the **July** series has been witnessed in **RELIANCE, SBIN, ICICIBANK, HDFCBANK**.
- **Unwinding** position for the **July** series has been witnessed in **INFY, HCLTECH**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	58200.70	58291.50	-0.16%
NIFTY AUTO	27343.50	27353.95	-0.04%
NIFTY FMCG	50225.85	50196.35	0.06%
NIFTY IT	27939.15	27276.45	2.43%
NIFTY METAL	12582.75	12722.45	-1.10%
NIFTY PHARMA	25677.70	25866.25	-0.73%
NIFTY REALTY	892.60	906.95	-1.58%
BSE CG	78303.25	79681.39	-1.73%
BSE CD	61817.74	61419.38	0.65%
BSE Oil & GAS	26450.07	26426.01	0.09%
BSE POWER	7790.16	7878.04	-1.12%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	68256.96	69737.69	-2.12%
HANG SENG	23496.89	23616.32	-0.51%
STRAITS TIMES	5342.24	5259.81	1.57%
SHANGHAI	3990.24	4041.24	-1.26%
KOSPI	7656.31	8051.33	-4.91%
JAKARTA	5986.50	5916.07	1.19%
TAIWAN	45479.11	46556.39	-2.31%
KLSE COMPOSITE	1682.93	1683.53	-0.04%
ALL ORDINARIES	9004.70	9037.00	-0.36%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	127892.37	112696.35
NSE F&O	153073.09	121632.21

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	393.19
NET SELL	-

(Source: [NSE](#))

Corporate News

- Trent Ltd** reported around 19% year-on-year (YoY) increase in standalone revenue for the June quarter (Q1FY27). The company continued to expand its retail footprint during the quarter, taking its total store count to 1,312 as of June 30, 2026. During the quarter, the company added a net 20 stores, including one Westside outlet and 19 Zudio stores, underscoring its continued focus on expanding its value fashion business.
- Titan Company** reported a 41% year-on-year (YoY) growth in its consumer businesses for the quarter ended 30 June 2026 (Q1 FY27). The company added a net 77 stores during the quarter, taking its consolidated retail network to 3,680 stores as of June 2026.
- Rites** announced that it has received an order from Volantis Asset Finance (Pty), South Africa, for the supply of Cape Gauge diesel-electric locomotives. The international contract involves the supply and commissioning of 4,000 HP Cape Gauge diesel-electric locomotives and is valued at \$35.8 million.
- Texmaco Rail & Engineering** said that it has received a letter of award (LoA) worth Rs 70.72 crore from Central Warehousing Corporation for the manufacture and supply of BLSS rakes along with Brake Van.
- Varun Beverages** has announced that its subsidiary, VBL Industries (Kenya), has entered into an agreement to acquire the value-added dairy beverages, juices and packaged drinking water business of Devyani Food Industries (Kenya) (DFIL Kenya).
- Info Edge India** reported standalone billings of Rs 737 crore for Q1 FY27, registering a 14.4% year-on-year (YoY) growth compared with Rs 644.2 crore in Q1 FY26. The Recruitment Solutions business recorded billings of Rs 552.7 crore in Q1 FY27, up from Rs 470.3 crore in the corresponding quarter last year.
- Jubilant FoodWorks** consolidated revenue from operations stood at Rs 2,569.3 crore in Q1 FY27, registering a 14.1% year-on-year (YoY) growth. The company's standalone revenue increased 9.2% YoY to Rs 1,848.5 crore in Q1 FY27.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1168.20	1134.20	3.00%
TECHM	1447.50	1406.50	2.92%
INFY	1071.80	1042.20	2.84%
TITAN	4604.20	4484.40	2.67%
SBILIFE	1832.30	1787.70	2.49%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TRENT	2927.80	3343.80	-12.44%
ADANIENT	3107.20	3206.60	-3.10%
ADANIPORTS	1833.90	1864.40	-1.64%
BEL	419.15	425.55	-1.50%
CIPLA	1451.80	1472.30	-1.39%

(Source: [Moneycontrol](#))

- Tata Power** aims for Rs 1 lakh crore revenue and Rs 10,000 crore profit by 2030. The company will expand its solar manufacturing capacity by adding a new 10 GW project. Tata Power is also open to entering the nuclear power segment with small modular reactors. The energy network currently serves over 13.1 million distribution customers.
- Reliance Industries Limited** has extended its Coal Bed Methane production contract with South West Pinnacle Exploration. This awarded work is expected to generate revenue from the second quarter of FY 2026-27. South West Pinnacle Exploration also received a separate contract from CMPDI for exploration services. This pact valued at Rs 5.89 crore will strengthen SWPE's order book.
- Premier Energies** secured orders valued at Rs 3,011 crore for solar cells and modules. These contracts are scheduled for delivery across fiscal years 2027 and 2028. The company will supply 1,846 MW of solar cells and modules to various clients. Premier Energies currently possesses significant manufacturing capacities for solar modules and cells. The firm is also investing Rs 6,000 crore to expand its integrated solar operations.
- South West Pinnacle Exploration** secured a work order worth approximately Rs 166.82 crore from Reliance Industries (RIL) for providing Coal Bed Methane (CBM) production services in Madhya Pradesh.
- Swiggy announced that it has qualified as an Indian Owned and Controlled Company (IOCC) under the Foreign Exchange Management (Non-Debt Instruments) Rules, 2019.
- Serentica Renewables proudly announces its new power purchase agreement with SECI, dedicated to a groundbreaking 600 MW Firm and Dispatchable Renewable Energy project. Notably, it achieved the largest allocation in the competitive SECI auction.
- Bharat Heavy Electricals** said that it has signed a strategic collaboration agreement (SCA) with thyssenkrup nucera India for Alkaline Electrolyser system for green hydrogen projects.
- KP Green Engineering** announced that it has secured fresh orders worth Rs 239.61 crore from multiple clients across diversified business segments. The orders include Rs 116.07 crore for solar projects, Rs 76.41 crore for crash barriers, Rs 16.66 crore for RSJ poles, Rs 11.32 crore for pre-engineered buildings (PEB), Rs 8.05 crore for transmission towers, Rs 6.74 crore for cable trays, rooftop solar and isolators, and Rs 4.36 crore for poles and high masts.
- Deep Industries** announced that it has received a Letter of Award (LoA) from Oil and Natural Gas Corporation (ONGC) for charter hiring services for natural gas compression at GGS Paliyad under the Ahmedabad Asset. The contract, valued at approximately Rs 49.10 crore.

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

Global News

- China's foreign exchange reserves fell to \$3.416 trillion at the end of June 2026, down from an over ten-year high of \$3.442 trillion touched in May.
- U.S. S&P Global Composite PMI increased to 51.9 in June from 51.5 in May. The services PMI rose to 51.2 in June of 2026 from 50.7 in the previous month.
- U.S. ISM Services PMI in the US fell to 54.0 in June 2026, down from 54.5 in May.
- Germany's industrial production rose 0.9% month-on-month in May 2026, accelerating from April's revised 0.2% increase. Compared with a year earlier, overall industrial production was unchanged, following a 0.9% decline in April.
- France's trade deficit widened to EUR 6.9 billion in May 2026 from EUR 5.4 billion in April. Exports fell 2.0% month-on-month to EUR 53.6 billion while imports increased 0.7% to EUR 60.5 billion.

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

Economic News

- Crude Oil traded at US\$ 68.66/bbl (IST 17:00).
- INR strengthened to Rs. 95.97 from Rs. 95.40 against each US\$ resulting in daily change of 0.45%.
- India's fuel consumption in June fell about 3.7% from a month earlier to 19.42 million metric tons. Fuel consumption eased from 20.18 million tons in May and was down 3.1% from a year earlier. Liquefied petroleum gas (LPG) consumption fell more than 14% from a year earlier to 2.19 million tons. Imports of LPG from the U.S. were set to top 1 million tons in June. Gasoline sales were down 3.2% from May but up 7.4% from a year earlier. Diesel consumption was up 6.2% from a year earlier but down 1.4% month-on-month. Naphtha sales fell 42% year-on-year, while bitumen consumption, used primarily in road construction, rose 14.7% from May but was down about 18% on an annual basis. Fuel oil usage fell about 20% from a month earlier.
- India's auto component industry grew strongly by 12.7% in FY26 with exports growing 5%, according to Automotive Component Manufacturers Association of India.
- Kharif sowing has gathered pace over the past few days as the southwest monsoon advanced across the country. However, the total area under cultivation remains 20.77% lower than a year ago because of delayed and uneven rainfall.

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

Forthcoming Events

Board Meetings as on 08/07/2026

Indbank Merchant Banking Services Limited	Financial Results
Vaishali Pharma Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 08/07/2026

Bliss GVS Pharma Limited	Dividend - Re 1 Per Share
Krishna Defence and Allied Industries Limited	Dividend - Rs 1.25 Per Share
MphasiS Limited	Dividend - Rs 62 Per Share
United Spirits Limited	Dividend - Rs 11 Per Share

(Source: NSE)

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