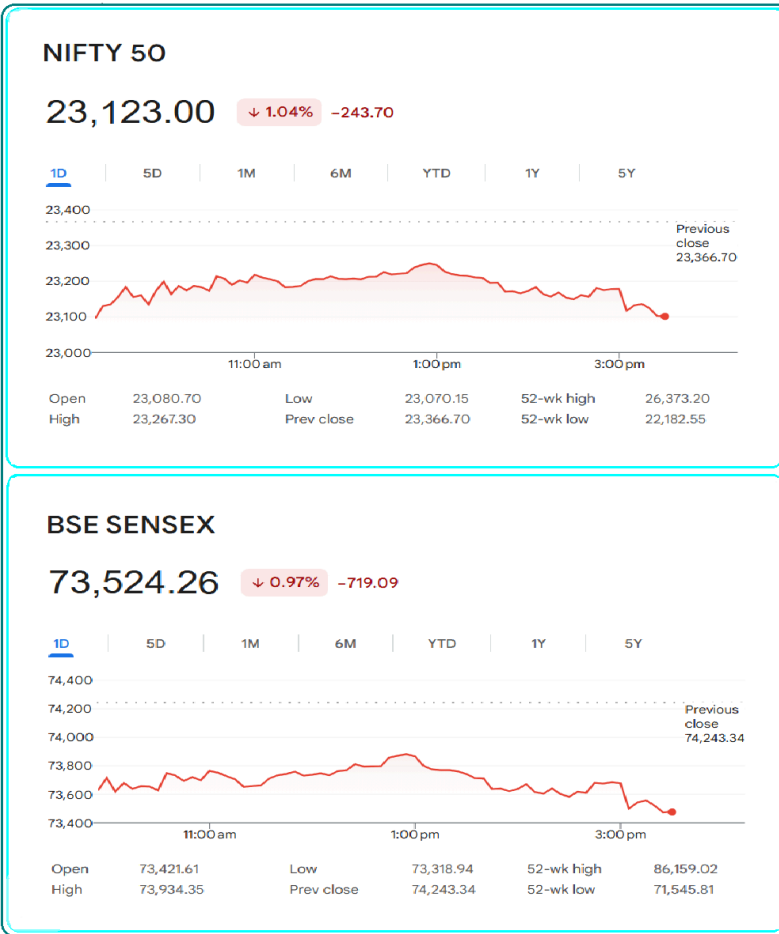


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23123.00	23366.70	-1.04%
S&P BSE SENSEX	73524.26	74243.34	-0.97%
NIFTY MID100	59905.65	60754.90	-1.40%
NIFTY SML100	17763.45	18110.30	-1.92%

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

Market Wrap Up

- The domestic equity indices ended with significant losses, extending losses for a second consecutive session, in line with a broad selloff across Asian markets amid escalating geopolitical tensions in the Middle East and a surge in crude oil prices. Investor sentiment was further weighed down by concerns over a possible interest rate hike in the United States. The S&P BSE Sensex tanked 719.08 points or 0.97% to 73,524.26. The Nifty 50 index lost 243.70 points or 1.04% to 23,123. The BSE 150 MidCap Index fell 1.70% and the BSE 250 SmallCap Index shed 1.88%. In the commodities market, Brent crude for August 2026 settlement surged \$3.92 or 4.21% to \$97.01 a barrel after reports indicated that Israel had launched fresh attacks on Lebanon over the weekend despite a ceasefire, raising concerns over regional stability and the smooth flow of oil shipments through the strategically important Strait of Hormuz. Among the sectoral indices, the Nifty Healthcare index (up 0.09%), the Nifty Pharma index (down 0.41%) and the Nifty FMCG Index (up 0.42%) outperformed the Nifty 50 index. Meanwhile, the Nifty Realty index (down 2.56%), Nifty Metal index (down 2.33%) and the Nifty Auto index (down 1.85%) the underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **June** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **14671** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **ONGC, BHARTIARTL, TECHMC**.
- Short** position build up for the **June** series has been witnessed in **RELIANCE, SBIN, ICICIBANK, HDFCBANK, INFY**.
- Unwinding** position for the **June** series has been witnessed in **HCLTECH, BRITANNIA**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54063.75	54496.25	-0.79%
NIFTY AUTO	25681.80	26165.95	-1.85%
NIFTY FMCG	48098.65	48302.45	-0.42%
NIFTY IT	28653.55	29010.30	-1.23%
NIFTY METAL	12913.65	13221.65	-2.33%
NIFTY PHARMA	24147.65	24248.05	-0.41%
NIFTY REALTY	749.20	768.90	-2.56%
BSE CG	78425.05	80010.94	-1.98%
BSE CD	57831.18	58654.45	-1.40%
BSE Oil & GAS	26156.95	26555.57	-1.50%
BSE POWER	7998.12	8135.27	-1.69%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	64024.60	66588.12	-3.85%
HANG SENG	24657.06	24961.95	-1.22%
STRAITS TIMES	4963.67	5049.96	-1.71%
SHANGHAI	3959.34	4027.74	-1.70%
KOSPI	7484.41	8160.59	-8.29%
JAKARTA	5342.14	5594.77	-4.52%
TAIWAN	43502.78	45070.94	-3.48%
KLSE COMPOSITE	1679.52	1693.43	-0.82%
ALL ORDINARIES	CLOSED	8855.90	-

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	109230.20	128871.14
NSE F&O	146073.83	173207.64

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	5555.67

(Source: [NSE](#))

Corporate News

- **Adani Ports and Special Economic Zone** said that it has secured a 10-year marine services contract for Argentina's first liquefied natural gas (LNG) export project.
- **RailTel Corporation of India** has received a letter of acceptance (LoA) worth Rs 82.04 crore from Haryana Rail Infrastructure Development Corporation (HRIDC) for railway signalling works.
- **H G Infra Engineering** received the provisional completion certificate from Adani Road Transport for Ganga Expressway project in Uttar Pradesh (UP). The contract is valued at Rs 4,970.99 crore.
- **Lupin** has announced a strategic collaboration with Spanish pharmaceutical company Laboratorios ERN S.A. for the launch of Luforbac (beclometasone/formoterol) 100/6, a fixed-dose combination inhaler.
- **Bajaj Electricals** announced its entry into cables category under its lighting solutions segment, aiming to capitalize on the growing demand in the cables industry.
- DDEL secured a significant Rs 386.83 crore contract from **Bharat Petroleum Corporation Ltd.** This order is set to be executed until February 2028, providing long-term revenue visibility. DDEL's order book now exceeds Rs 2,400 crore, positioning the company for sustained growth. The company is expanding its participation in high-value opportunities both domestically and internationally.
- **Nestle India's** royalty payments to its Swiss parent surged by 13.91% to Rs 1,024.5 crore in FY26. Despite this increase, shareholders previously rejected a proposal to further raise royalty rates. The company's revenue also saw a 14.2% rise in the same fiscal year.
- **RailTel Corporation of India** has received a work order worth Rs 41.32 crore from the Uttar Pradesh Police Recruitment and Promotion Board for providing security-related ancillary services during recruitment examinations.
- **Dynacons Systems & Solutions** has secured a contract worth Rs 125.88 crore (excluding GST) from Central Bank of India for the expansion of the bank's private cloud

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
MAXHEALTH	1007.45	977.25	3.09%
POWERGRID	290.30	285.65	1.63%
TECHM	1503.40	1483.50	1.34%
BEL	412.95	408.20	1.16%
NESTLEIND	1398.90	1386.20	0.92%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
WIPRO	181.76	198.37	-8.37%
JIOFIN	228.86	236.89	-3.39%
ETERNAL	248.30	256.50	-3.20%
SHRIRAMFIN	896.65	923.30	-2.89%
HINDALCO	1062.40	1092.60	-2.76%

(Source: [Moneycontrol](#))

- **Adani Ports and Special Economic Zone** has incorporated a new step-down wholly owned subsidiary in the United Arab Emirates as part of its marine business expansion strategy.
- **Coal India** announced series of business-friendly initiatives, aimed at enhancing coal availability for non-regulated sector (NRS) consumers and providing greater operational flexibility to industry participants.

infrastructure and deployment of advanced computing platforms.

- **Waaree Renewable Technologies** announced that it has received a Letter of Award (LoA) from Sunsational Power Private Limited (SPPL) for the execution of an Engineering, Procurement and Construction (EPC) contract.
- **Cupid Breweries and Distilleries** said that it has entered into an agreement with United Spirits, a Diageo Group company, for the purchase of an operational alco-beverage manufacturing unit in Gopalpur, Odisha, for Rs 22.50 crore.
- **Tata Steel** indicated that a fire broke out at the company's Port Talbot plant in the UK on Wednesday night, leading to a temporary suspension of operations in a section of the facility.
- **Bluspring Enterprises** has secured a comprehensive operations and maintenance (O&M) contract from Bharat Aluminium Company (BALCO) for its 1,740 MW power plant. The contract, valued at an estimated Rs 2,049.8 crore.
- **GPS Renewables** has secured Rs. 635 crore in Series C funding to expand its compressed biogas (CBG) infrastructure.

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

Global News

- China's foreign exchange reserves climbed by USD 31.7 billion to USD 3.442 trillion in May 2026, marking a 0.93% rise from USD 3.411 trillion in April.
- U.S. economy added 172,000 jobs in May 2026, following an upwardly revised 179,000 gain in the previous month. Private nonfarm payrolls increased by 120 thousand in May of 2026. The unemployment rate remained at 4.3% in May 2026.
- U.S. total consumer credit increased by \$20.7 billion in April 2026, following a downwardly revised \$22.3 billion gain in April.
- Eurozone Sentix investor sentiment index rose more-than-expected to -13.4 in June from -16.4 in May.
- Germany's factory orders dropped 3.8% mom in April 2026, reversing a downwardly revised 4.5% increase in the prior

month.

- Japan's GDP grew 0.5% qoq in Q1 2026, accelerating from a 0.2% gain in Q4. The economy expanded by 0.6% year-on-year in the first quarter of 2026, following a 0.2% growth in the previous period.
- Japan's current account surplus increased to JPY 3,907.8 billion in April 2026 from JPY 2,370.0 billion in the same month a year earlier.

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

Economic News

- Crude Oil traded at US\$ 94.00/bbl (IST 17:00).
- INR weakened to Rs. 95.72 from Rs. 94.96 against each US\$ resulting in daily change of 0.80%.
- India's automobile retail sales rose 9.6% year-on-year in May, as per FADA. Vehicle registrations across categories climbed to 25.31 lakh units in May. Passenger vehicles emerged as the strongest-performing segment, with retail sales surging 23.3% year-on-year to 402,591 units. Rural markets significantly outpaced urban centres, growing 30.4% compared with 18.8% in cities, reflecting stronger demand from non-metro regions. The share of CNG-powered passenger vehicles rose to 23.3% during the month, while electric vehicles accounted for 6.6% of PV sales. Overall, alternative-fuel vehicles represented more than 38% of passenger vehicle registrations. Two-wheeler sales, the largest segment by volume, rose 7.5% year-on-year to 1.84 million units. Urban demand grew 11.8%, while rural sales increased 4.7%. Electric two-wheelers accounted for 9.25% of registrations in May, up from 6.11% a year earlier, as buyers increasingly sought fuel-efficient alternatives. Commercial vehicle sales rose 5.3% to 83,823 units, with rural markets again outperforming urban areas. Rural CV registrations increased 8.1% compared with 2.6% growth in cities. Tractor sales climbed 11.2% year-on-year to 83,092 units, benefiting from healthy farm economics and expectations of stronger agricultural activity as the sowing season approaches. Three-wheeler registrations rose 3.6%, while wheeled construction equipment sales declined 17.5% due to a high base effect.
- India will discuss easing export compliance for marine goods, agricultural items, and processed foods with the Eurasian Economic Union. Talks will focus on sanitary and phytosanitary rules and technical barriers to trade. These measures act as non-tariff barriers. Indian trade negotiators will visit Moscow for the second round of talks. The terms of reference were signed last year.
- The Reserve Bank of India is expected to increase interest rates soon. This move aligns with other central banks responding to rising inflation. Policymakers have signaled a potential rate hike if price pressures become widespread. The RBI has also raised its inflation forecast for the fiscal year ending March 2027. Economists anticipate rate increases in the coming months.
- External Affairs Minister S Jaishankar co-chaired the 8th Joint Commission Meeting in New Delhi with his Indonesian counterpart Sugiono. The discussions focused on expanding multi-sectoral cooperation, including defence, trade, and health, while strengthening counter-terrorism ties and building on the fresh momentum from recent high-level leadership visits.
- Banks will now encourage more foreign currency deposits. The Reserve Bank of India will cover all hedging costs for these deposits. This move aims to attract significant foreign currency inflows. Industry estimates suggest up to \$40 billion could

be raised. These measures will strengthen India's foreign exchange reserves. This will help manage rupee depreciation pressures.

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

Forthcoming Events

Board Meetings as on 09/06/2026

Hitech Corporation Limited

Voluntary Delisting

(Source: NSE)

Corporate Actions as on 09/06/2026

INOX India Limited

Dividend - Rs 2 Per Share

NELCO Limited

Dividend - Rs 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 |