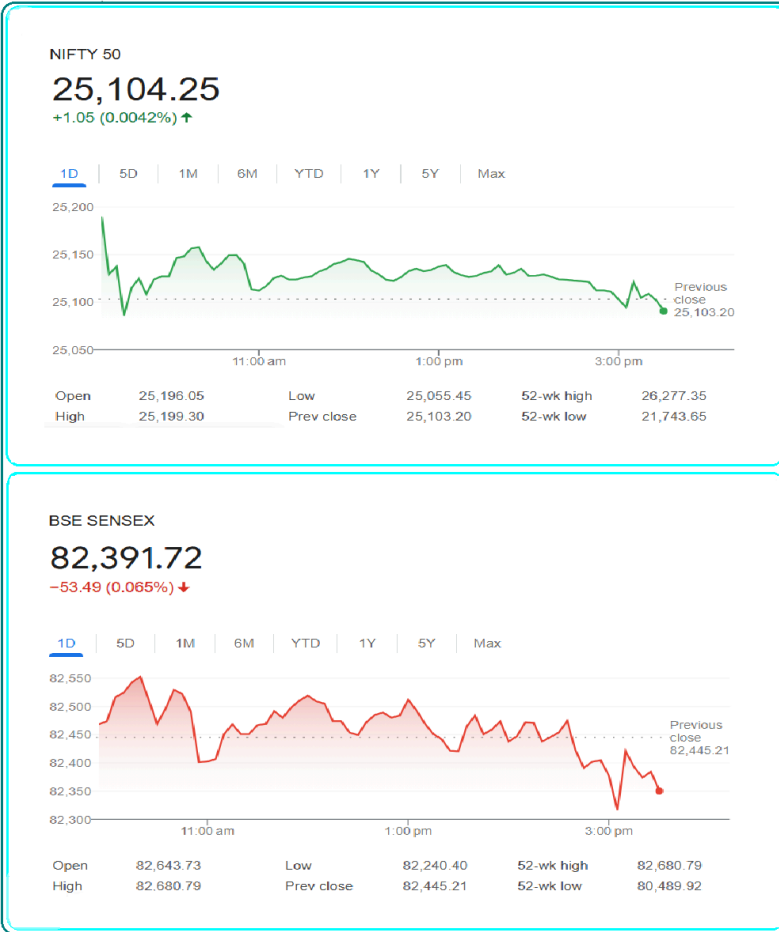


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25104.25	25103.20	0.00%
S&P BSE SENSEX	82391.72	82445.21	-0.06%
NIFTY MID100	59681.40	59674.95	0.01%
NIFTY SML100	18899.80	18873.40	0.14%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56629.10	56839.60	-0.37%

Market Wrap Up

- The key equity indices ended sideways today, as investors kept a close eye on ongoing US-China trade discussions and varied global indicators. The Nifty ended above the 25,100 level.
- The S&P BSE Sensex shed 53.49 points or 0.06% to 82,391.72. The Nifty 50 index rose 1.05 points or 0.00% to 25,104.25.
- The S&P BSE Mid-Cap index rose 0.04% and the S&P BSE Small-Cap index added 0.33%.
- Among the sectoral indices, the Nifty IT index (up 1.67%), the Nifty Media index (up 1.09%) and the Nifty Pharma index (up 0.56%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Realty index (down 1.14%), the Nifty PSU Bank index (down 0.52%) and the Nifty Financial Services index (down 0.46%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **June** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **1284** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **BHEL, INFY, COFORGE**.
- Short** position build up for the **June** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.
- Unwinding** position for the **June** series has been witnessed in **TATAMOTORS, POLICYBZR**.

(Source: Capitaline F&O)

NIFTY AUTO	23759.00	23777.15	-0.08%
NIFTY FMCG	56198.80	56026.10	0.31%
NIFTY IT	38299.95	37669.20	1.67%
NIFTY METAL	9509.70	9477.00	0.35%
NIFTY PHARMA	21948.00	21826.80	0.56%
NIFTY REALTY	1026.30	1038.15	-1.14%
BSE CG	71464.12	71316.58	0.21%
BSE CD	58688.47	58433.46	0.44%
BSE Oil & GAS	27401.13	27382.71	0.07%
BSE POWER	6984.25	6918.77	0.95%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38211.51	38088.57	0.32%
HANG SENG	24162.87	24181.43	-0.08%
STRAITS TIMES	3933.80	3936.32	-0.06%
SHANGHAI	3384.82	3399.77	-0.44%
KOSPI	2871.85	2855.77	0.56%
JAKARTA	7230.75	7113.42	1.65%
TAIWAN	22242.14	21790.29	2.07%
KLSE COMPOSITE	1516.95	1519.41	-0.16%
ALL ORDINARIES	8812.70	8741.90	0.81%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	115862.94	117745.56
NSE F&O	129950.73	140108.44

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	2301.87
NET SELL	-

(Source: [NSE](#))

Corporate News

- L&T** has secured new grid infrastructure orders, valued between Rs 5,000-10,000 crore, from both Indian and international markets. In India, the company will construct a transmission line for integrating a renewable energy zone in Andhra Pradesh. Furthermore, L&T will execute gas insulated substation projects in the Middle East, reinforcing its presence in the region.
- Tata Motors** plans to invest Rs. 33,000-35,000 crore in its passenger vehicle business, including EVs, over the next five years, aiming to launch 30 models by the decade's end. The company targets a 16% PV market share by FY27, increasing to 18-20% by FY30, with EVs comprising a significant portion of sales.
- TVS Motor Company** has launched the 2025 TVS Apache RTR 200 4V motorcycle range, compliant with OBD2B emission standards. Celebrating 20 years of the Apache series and six million riders globally, the updated model features advanced technology, enhanced performance, and improved safety. It includes upside-down front suspension, a hydro-formed handlebar, and refreshed aesthetics, with prices starting at Rs1,53,990.
- Allcargo Gati Ltd** has broadened its air services by introducing a 24-hour air delivery service to eight major metro cities. This expansion, supported by connectivity to 34 airports, caters to industries like pharmaceuticals and electronics. The Air Express service offers late cut-off times and next-day delivery, strengthening Allcargo Gati's network and enhancing its position as a reliable logistics partner.
- ACME Solar Holdings Limited** has announced the commissioning of 75 MW capacity at its Sikar, Rajasthan solar project. This follows an earlier commissioning of 165 MW. The total commissioned capacity at the ACME Sikar Solar Project now stands at 240 MW out of 300 MW. With this addition, the company's total operational capacity has risen to 2,806.4 MW.
- NTPC Group** has commenced commercial operations of 193 MW capacity at its Nokh Solar PV Project in Rajasthan, increasing its total operational capacity to 80,708 MW. This addition is part of the 245 MW capacity at plot-3 of the Nokh Solar PV Project. NTPC's standalone and group

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
GRASIM	2708.00	2608.50	3.81%
DRREDDY	1348.80	1319.10	2.25%
TATAMOTORS	732.25	717.80	2.01%
TECHM	1610.90	1579.10	2.01%
INFY	1596.00	1572.90	1.47%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TRENT	5814.00	5913.50	-1.68%
ASIANPAINT	2218.90	2247.90	-1.29%
BAJFINANCE	9497.50	9607.50	-1.14%
TATASTEEL	155.68	157.32	-1.04%
BAJAJFINSV	1998.10	2017.40	-0.96%

(Source: [Moneycontrol](#))

- **Zydus Lifesciences** announced that it has received the Establishment Inspection Report (EIR) from the US Food and Drug Administration (USFDA) for its Active Pharmaceutical Ingredient (API) manufacturing facility located at Dabhasa, near Vadodara.
- **Tata Power Company** announced that its solar manufacturing arm, TP Solar, has crossed 4 GW of cumulative solar module output at its facility in Tirunelveli, Tamil Nadu.
- **NBCC (India)** announced that it has secured an order worth Rs 50.54 crore for a temple development project under the Ministry of Tourism's Prashad scheme at Maa Chintpurni Temple in Himachal Pradesh.
- **Zee Entertainment Enterprises** announced a strategic partnership with the new-age content & tech start-up, Bullet, to launch India's first micro-drama app.

commercial capacity now stands at 59,606 MW and 80,708 MW, respectively.

- **Jindal Saw** approved setting up a step-down subsidiary in the UAE to build a 300,000 TPA pipe manufacturing facility in Abu Dhabi, targeting the MENA region's oil and gas sector. In Saudi Arabia, it formed joint ventures with Buhur for an HSAW pipe project and with RAX for ductile iron pipe manufacturing. Necessary approvals will be secured for these expansions.
- **Mahindra & Mahindra Limited** has increased its stake in Mahindra Financial Services Limited (MMFSL). It is a non-listed subsidiary of the company. The company has increased stake through purchase of stake under via rights issue. M&M has received 8.52 Crore equity shares at Rs. 194 per share as part of Rs. 2,996 Crore rights issue. The company has acquired the stake at Rs. 1,652 Crore, including the company's right entitlement and additional shares.
- **ITD Cementation Limited** has received new orders worth Rs. 893 Crore, including GST. The order is for the construction of berth and breakwater structures associated with greenfield captive jetty development in Odisha.
- **RITES Ltd** has won a contract worth around \$2.9 million from the government of Guyana. The deal is for supervising construction work under Phase 2 of the East Bank-East Coast Road project. It also includes extra work tied to an earlier assignment already in progress.
- **Hindustan Copper Ltd** signed a Memorandum of Understanding (MoU) with RITES Ltd on June 6, aiming to collaborate on projects related to metals and critical minerals. The project is to jointly develop a supply chain that is fast, dependable, and sustainable, covering a range of minerals, including copper and other strategically important resources.

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

Global News

- U.S. wholesale inventories increased by 0.2% over a month to \$908.7 billion in April 2025, following a downward revision of March's increase to 0.3%.
- U.K. unemployment rate edged up to 4.6% in the three months to April 2025 from 4.5% in the previous period. The number of people claiming unemployment benefits in the UK increased by 33.1 thousand to 1.735 million in May 2025, following a revised 21.2 thousand decline in the previous month.
- Eurozone Sentix Investor Confidence Index jumped sharply to 0.2 in June following May's -8.1.

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

Economic News

- Crude Oil traded at US\$ 65.63/bbl (IST 17:00).
- INR strengthened to Rs. 85.61 from Rs. 85.63 against each US\$ resulting in daily change of 0.02%.
- Union Agriculture Minister Shivraj Singh Chouhan announced a 40% increase in India's agriculture production over the last decade, with a 5.4% growth rate in the fourth quarter of FY2024-25.
- The government is overhauling the Consumer Price Index (CPI) to better reflect electricity and housing costs. The new electricity index will factor in slab-wise consumption, fixed charges, and meter fees instead of just per-unit rates. The housing index will exclude government-provided housing and add rural data.
- The Reserve Bank of India will halt daily VRR auctions from June 11 due to surplus liquidity exceeding 1% of NDTL. This move aligns with stable liquidity conditions and no new OMOs. Bond yields rose amid negative sentiment and triggered stop losses following a policy stance shift to 'neutral'.
- India's poverty rate to decline to 4.6% in 2024, a significant drop from the World Bank's 5.3% estimate for 2023.

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

Forthcoming Events

Board Meetings as on 11/06/2025

City Union Bank Limited	Dividend/Fund Raising
Hindustan Zinc Limited	Dividend
Libas Consumer Products Limited	Financial Results

(Source: NSE)

Corporate Actions as on 11/06/2025

Tata Elxsi Limited	Dividend - Rs 75 Per Share
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(Source: NSE)

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