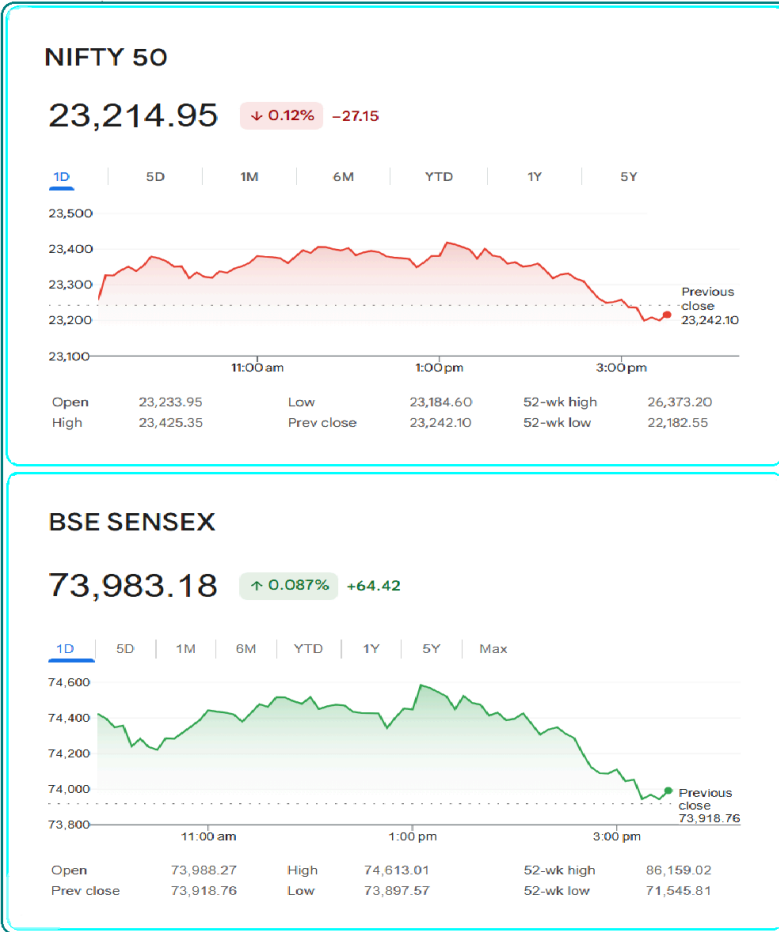


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	23214.95	23242.10	<b>-0.12%</b>
<b>S&amp;P BSE SENSEX</b>	73983.18	73918.76	<b>0.09%</b>
<b>NIFTY MID100</b>	59810.20	60715.45	<b>-1.49%</b>
<b>NIFTY SML100</b>	17822.50	18063.60	<b>-1.33%</b>

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

## Market Wrap Up

- The domestic equity indices ended sideways today amid a fresh escalation in tensions between the U.S. and Iran. The Nifty ended below the 23,250 mark.
- The S&P BSE Sensex advanced 64.42 points or 0.09% to 73,983.18. The Nifty 50 index fell 27.15 points or 0.12% to 23,214.95.
- The BSE 150 MidCap Index fell 1.36% and the BSE 250 SmallCap Index shed 1.13%.
- Among the sectoral indices, the Nifty FMCG index (up 1.05%), the Nifty Private Bank index (up 0.72%) and the Nifty Financial Services Index (up 0.21%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 2.36%), Nifty Realty index (down 1.74%) and the Nifty Metal index (down 1.70%) the underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **June** series futures witnessed an unwinding of **short** position. Open Interest has been decreased by **2364** contracts at the end of the day.
- **Long** position build up for the **June** series has been witnessed in **LT, ICICIBANK, HDFCBANK**.
- **Short** position build up for the **June** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, INFY**.
- **Unwinding** position for the **June** series has been witnessed in **BHEL, HCLTECH**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55100.30	55194.50	-0.17%
NIFTY AUTO	25833.55	26025.65	-0.74%
NIFTY FMCG	48957.00	48447.40	1.05%
NIFTY IT	28279.90	28516.25	-0.83%
NIFTY METAL	12766.45	12987.10	-1.70%
NIFTY PHARMA	24160.75	24290.30	-0.53%
NIFTY REALTY	748.15	761.40	-1.74%
BSE CG	78091.07	79227.15	-1.43%
BSE CD	57502.61	57985.37	-0.83%
BSE Oil & GAS	25757.44	26220.84	-1.77%
BSE POWER	7867.87	7999.25	-1.64%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	64179.27	65416.63	-1.89%
HANG SENG	24407.96	24565.90	-0.64%
STRAITS TIMES	4958.85	5023.25	-1.28%
SHANGHAI	3993.23	4010.03	-0.42%
KOSPI	7730.82	8096.93	-4.52%
JAKARTA	5902.38	5746.65	2.71%
TAIWAN	43225.54	44704.44	-3.31%
KLSE COMPOSITE	1678.96	1675.50	0.21%
ALL ORDINARIES	8857.00	8824.80	0.36%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	119714.14	123202.80
NSE F&O	128693.64	162017.48

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2124.98

(Source: [NSE](#))

## Corporate News

- **Reliance Industries** announced a partnership with Meta Platforms to develop an AI-enabled data centre in Jamnagar, Gujarat.
- **HCL Technologies** announced that it has launched its Cybersecurity Fusion Center (CSFC) in Mississauga, Ontario, aiming to strengthen its cybersecurity capabilities in Canada.
- **Adani Energy Solutions** is set to acquire smart metering company IntelliSmart Infrastructure for Rs. 3,050 crore, bolstering its position as India's largest smart metering platform with over 47 million meters. This strategic move aligns with India's ambitious plan to replace 250 million conventional electricity meters with smart meters to modernize the power distribution ecosystem and reduce losses.
- **Juniper Green Energy** has expanded its presence in Gujarat by commissioning 305 MWp of renewable energy capacity for Gujarat Urja Vikas Nigam Ltd. The projects, located across Surendranagar, Aravalli, and Devbhumi Dwarka districts, include solar and wind power. This achievement highlights Juniper Green Energy's project execution skills and dedication to providing sustainable energy solutions for the state.
- **Bharti Airtel** announced the deployment of more than 2900+ new 5G sites across the Upper North region over the past 12 months. This expansion delivers faster speeds, wider coverage, and a superior network experience for customers.
- **LTM** introduced BlueVerse™ Currency, an AI-linked commercial model that prices enterprise work by outcomes rather than effort consumed as enterprises scale agentic AI across core processes.
- **Concord Biotech** announced that it has received approval from the US Food and Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) for Tofacitinib Tablets in 5 mg and 10 mg strengths.
- **Afcons Infrastructure** announced that it has received a Letter of Award (LoA) from Vadhvan Port Project (VPPL) for the construction of a breakwater at the upcoming

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
NESTLEIND	1438.30	1410.40	1.98%
HINDUNILVR	2169.50	2132.80	1.72%
AXISBANK	1314.50	1292.40	1.71%
KOTAKBANK	388.10	381.70	1.68%
ICICIBANK	1293.30	1275.00	1.44%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
HINDALCO	1039.30	1076.70	-3.47%
COALINDIA	451.00	466.90	-3.41%
INFY	1145.30	1180.30	-2.97%
ONGC	251.90	259.00	-2.74%
ETERNAL	239.80	245.65	-2.38%

(Source: [Moneycontrol](#))

- **Veranda Learning** has signed a memorandum of understanding (MoU) with Japan-based CPA Excellent Partners (CPAEP) to collaborate on talent development, recruitment and career support for accounting and finance professionals across global markets.
- **Quality Power Electrical Equipments** announced the execution of a term sheet to acquire a 100% stake in Winwin Speciality Insulators (WSIL) for an enterprise value of Rs 315 crore.

Vadhvan Port in Maharashtra.

- **KNR Construction** announced that it has received letter of acceptance (LoA) from Malkajgiri Municipal Corporation for the construction of a flyover project in Hyderabad, Telangana. The contract is valued at Rs 235.07 crore.
- **JSW Infrastructure** received a letter of award (LoA) from Syama Prasad Mookerjee Port Authority (SMPA).
- **Nulcues Software Exports** announced a strategic partnership with Azentra Solusi Digital to further strengthen digital transformation capabilities for banks and financial institutions across the Indonesia.
- **Garden Reach Shipbuilders & Engineers** said the Ministry of Defence has nominated Dr Vijay Namdeorao Zade, Joint Secretary (Naval Systems), as Part-Time Official Director (Government Nominee Director) on its board.
- **Deccan Gold Mines** said that it has entered into a definitive earn-in/option and shareholders agreement to acquire an initial 51% stake in Spain-based Logrosan Minera S.L. (LMSL) through an earn-in investment of EUR 1.76 million.
- **Elitecon International** has announced a strategic roadmap to build a diversified FMCG platform targeting approximately Rs. 20,000 crore in revenue by FY2030.

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

## Global News

- China's annual inflation held steady at 1.2% in May 2026, unchanged from the previous month. On a monthly basis, consumer prices edged down 0.1%, reversing a 0.3% increase in April.
- China's producer prices increased 3.9% year-on-year in May 2026, accelerating from a 2.8% rise in the previous month. Monthly, PPI rose 0.5%, easing from a 1.7% gain in April.
- U.S. trade deficit narrowed to \$55.9 billion in April 2026 from a revised \$56.6 billion in March. Exports rose 2.6% (\$8.3 billion) to a record \$327.1 billion while the imports increased 2.0% (\$7.6 billion) to \$383.0 billion.
- U.S. private employers added an average of 29,000 jobs per week in the four weeks ending May 23, 2026, according to the ADP Research Institute, a slight decrease from the 30,500 weekly gain in the prior period.

- U.S. existing home sales rose by 3.2% from the previous month to an annualized rate of 4.17 million, extending the rebound from the seven-month low in March.
- U.S. wholesale inventories rose 0.6% month-over-month to \$940.3 billion in April 2026, following an upwardly revised 1.5% increase in March.
- Japan's producer prices rose 6.3% yoy in May 2026, accelerating from an upwardly revised 5.3% increase in the prior month. Monthly, producer prices increased 0.9%, easing from an upwardly revised 2.8% rise in April.

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

## Economic News

- Crude Oil traded at US\$ 89.85/bbl (IST 17:00).
- INR strengthened to Rs. 95.28 from Rs. 95.34 against each US\$ resulting in daily change of 0.06%.
- India's exports are seeing steady growth. Supportive government policies and improved infrastructure are key drivers. The nation aims for global leadership in textiles and apparel. Initiatives like PLI schemes and Mega Textile Parks are strengthening the value chain. Jaipur is a major apparel export hub for Rajasthan. Exporters are blending tradition with technology to reach international markets.
- India and Oman's new trade pact unlocks significant export potential for sectors like textiles, gems, and marine products. This agreement also strengthens services and mobility links. Experts highlight its role in enhancing India's energy security and supply chain resilience.

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

## Forthcoming Events

### Board Meetings as on 11/06/2026

Hindustan Oil Exploration Company Limited	Financial Results
Ratnaveer Precision Engineering Limited	Fund Raising

(Source: NSE)

### Corporate Actions as on 11/06/2026

Sunshield Chemicals Ltd	Dividend - Rs 3.00 Per Share
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(Source: NSE)

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