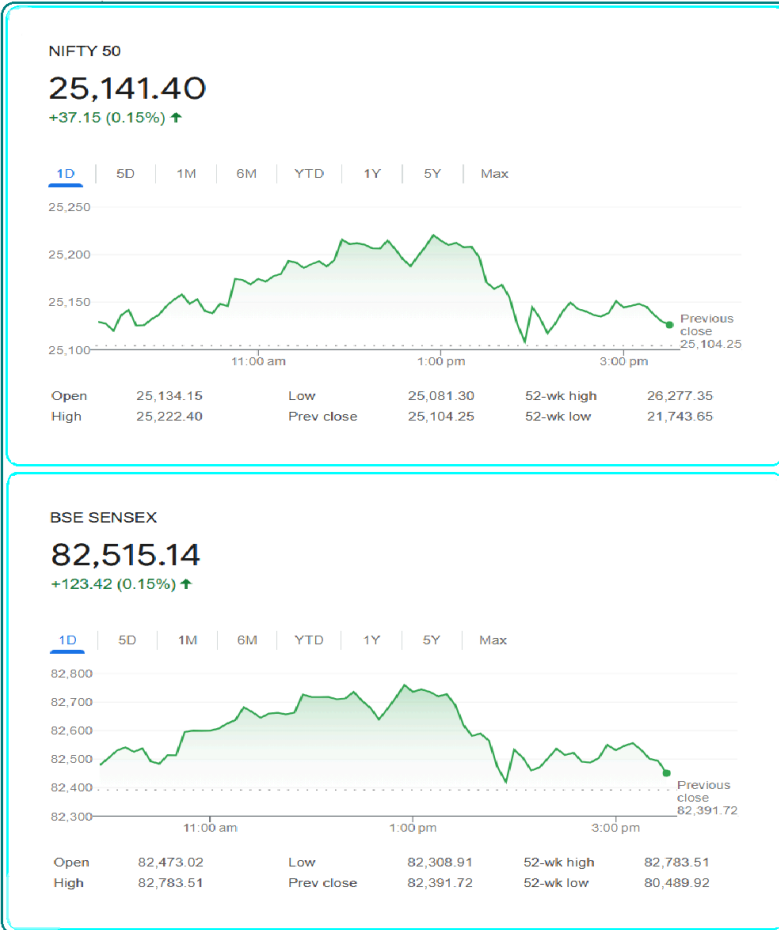


Index Chart



(Source: [Bloomberg](#))

Indian Markets

| Indices | Close | Previous | Change(%) |
|----------------|----------|----------|-----------|
| NIFTY 50 | 25141.40 | 25104.25 | 0.15% |
| S&P BSE SENSEX | 82515.14 | 82391.72 | 0.15% |
| NIFTY MID100 | 59388.15 | 59681.40 | -0.49% |
| NIFTY SML100 | 18798.75 | 18899.80 | -0.53% |

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

Sectoral Indices

| Indices | Close | Previous | Change(%) |
|------------|----------|----------|-----------|
| NIFTY BANK | 56459.75 | 56629.10 | -0.30% |

Market Wrap Up

- The key equity indices ended with minor gains today, buoyed by positive global trade developments. Optimism from Asian markets and encouraging signals from US-China trade negotiations in London lifted investor sentiment. The Nifty ended above the 25,100 level.
- The S&P BSE Sensex added 123.42 points or 0.15% to 82,515.14. The Nifty 50 index rose 37.15 points or 0.15% to 25,141.40.
- The S&P BSE Mid-Cap index shed 0.12% and the S&P BSE Small-Cap index rose 0.06%.
- Among the sectoral indices, the Nifty Oil & Gas index (up 1.47%), the Nifty IT index (up 1.26%) and the Nifty Pharma index (up 0.50%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty PSU Bank index (down 0.88%), the Nifty FMCG index (down 0.67%) and the Nifty Bank index (down 0.30%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **June** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **1981** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **ICICIBANK**, **BAJAJFINSV**, **INFY**.
- Short** position build up for the **June** series has been witnessed in **SBIN**, **HDFCBANK**, **BAJFINANCE**.
- Unwinding** position for the **June** series has been witnessed in **BAJAJ-AUTO**, **CESC**, **BIOCON**.

(Source: Capitaline F&O)

| | | | |
|---------------|----------|----------|--------|
| NIFTY AUTO | 23805.20 | 23759.00 | 0.19% |
| NIFTY FMCG | 55820.60 | 56198.80 | -0.67% |
| NIFTY IT | 38784.30 | 38299.95 | 1.26% |
| NIFTY METAL | 9495.80 | 9509.70 | -0.15% |
| NIFTY PHARMA | 22057.15 | 21948.00 | 0.50% |
| NIFTY REALTY | 1027.25 | 1026.30 | 0.09% |
| BSE CG | 71160.97 | 71464.12 | -0.42% |
| BSE CD | 58579.10 | 58688.47 | -0.19% |
| BSE Oil & GAS | 27903.52 | 27401.13 | 1.83% |
| BSE POWER | 6928.01 | 6984.25 | -0.81% |

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

Asia Pacific Markets

| Indices | Close | Previous | Change (%) |
|----------------|----------|----------|------------|
| NIKKEI225 | 38421.19 | 38211.51 | 0.55% |
| HANG SENG | 24366.94 | 24162.87 | 0.84% |
| STRAITS TIMES | 3919.05 | 3933.80 | -0.37% |
| SHANGHAI | 3402.32 | 3384.82 | 0.52% |
| KOSPI | 2907.04 | 2871.85 | 1.23% |
| JAKARTA | 7222.46 | 7230.75 | -0.11% |
| TAIWAN | 22471.10 | 22242.14 | 1.03% |
| KLSE COMPOSITE | 1523.84 | 1516.95 | 0.45% |
| ALL ORDINARIES | 8819.70 | 8812.70 | 0.08% |

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

| Market | Current | Previous |
|----------|-----------|-----------|
| NSE Cash | 124232.01 | 115862.94 |
| NSE F&O | 149616.96 | 129950.73 |

(Source: [NSE](#))

FII Activities (Crores)

| ACTIVITIES | Cash |
|------------|--------|
| NET BUY | - |
| NET SELL | 446.31 |

(Source: [NSE](#))

Corporate News

- **Wipro** has announced that it has extended its partnership with Metro AG. The company has extended the pact for 2 years. Wipro will be responsible to provide Metro with integrated digital services across application development, cloud, and data.
- **Maruti Suzuki** has recently reduced its near-term production target for its electric vehicle, the e-Vitara, by two-thirds owing to shortage of rare earth materials. The business is now planning to produce as much as 8,221 units between April to September, as compared to its initial target of 26,512. This is a significant cut down against the target.
- **Waaree Energies's** wholly owned subsidiary, Waaree Solar Americas has received an order for supply of 599 MW solar modules. The orders were awarded by a renowned customer, a leading developer and owner-operator of utility-scale solar and energy storage projects across the United States.
- **HCL Technologies** announced an expansion of its partnership with Standard Insurance Company (The Standard) to deliver AI driven infrastructure, enhance customer experience.
- **Bank of Baroda** has announced in its MCLR. These changes shall be effective from June 12, 2025. The bank said changes in MCLR will impact borrowers with loans linked to interest-rates. It has not announced any changes in its overnight MCLR. The existing MCLR is 8.15%.
- **Texmaco** has secured an order worth Rs 44.04 crore from Mumbai Railway Vikas Corporation Limited. The scope of work includes installation of 1X25 kV 110/25 kV traction substation (TSS) with 40/56 MVA AC traction transformers, two sectioning posts, and associated infrastructure.
- **Indian Oil** has sharply increased its bulk diesel market share to 53.5% in April-May 2025 from 43.6% a year earlier, overtaking rivals Reliance Industries and Nayara Energy. The surge follows a strategic shift under new chairman A.S. Sahney, who prioritized market dominance over high margins.

Top Gainers

| SCRIP NAME | Close | Previous | Change (%) |
|----------------|---------|----------|--------------|
| HCLTECH | 1721.90 | 1668.10 | 3.23% |
| INFY | 1631.10 | 1596.00 | 2.20% |
| TECHM | 1637.50 | 1610.90 | 1.65% |
| WIPRO | 258.92 | 254.87 | 1.59% |
| ONGC | 247.32 | 244.68 | 1.08% |

(Source: [Moneycontrol](#))

Top Losers

| SCRIP NAME | Close | Previous | Change (%) |
|-------------------|---------|----------|---------------|
| SHRIRAMFIN | 686.05 | 700.40 | -2.05% |
| POWERGRID | 295.45 | 301.05 | -1.86% |
| ADANIENT | 2581.20 | 2613.10 | -1.22% |
| ADANIPORTS | 1456.40 | 1473.80 | -1.18% |
| BEL | 392.90 | 397.40 | -1.13% |

(Source: [Moneycontrol](#))

- **Kaynes Technology India** announced that its wholly owned subsidiary, Kaynes Semicon has entered into asset purchase agreement (APA) with Fujitsu General Electronics (Fujitsu Electronics) to acquire the production lines for power modules.
- **Interarch Building Solutions** has received a purchase order worth Rs 45 crore from a prestigious Automobile Original Equipment Manufacturer (OEM).
- **KP Green Engineering** announced that it has secured new orders totaling Rs 97.27 crore from multiple clients.
- **Rishabh Instruments's** wholly owned subsidiary, Lumel SA signed a contract worth Euro 5 million (Rs 50 crore) with leading Germany based energy sector company to supply electronics devices.

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

Global News

- Japan's producer prices rose 3.2% yoy in May 2025, slowing from a marginally revised 4.1% growth in April. On a monthly basis, producer prices shrank 0.2%, marking the first fall in nine months.
- South Korea's unemployment rate held steady at seasonally adjusted 2.7% in May. The number of unemployed declined by 32,000 from the last year to 853,000 in May.

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

Economic News

- Crude Oil traded at US\$ 65.94/bbl (IST 17:00).
- INR strengthened to Rs. 85.51 from Rs. 85.61 against each US\$ resulting in daily change of 0.12%.
- India's tea exports saw a rise of 9.92 percent in 2024. Total exports reached 254.67 million kg. North Indian tea estates produced 154.81 million kg. South India's production stood at 99.86 million kg.
- The World Bank has revised India's FY26 growth forecast downward to 6.3%, citing weaker exports and rising global trade

barriers, although India remains a fast-growing economy. Despite this, the RBI maintains a 6.5% growth projection for FY26. Globally, growth is expected to slow, impacting the South Asian region.

- India's green hydrogen costs are projected to decrease by up to 40% due to government support and incentives, potentially reaching Rs 260-310 per kg. The nation's Green Hydrogen Mission, launched in January 2023 with a Rs 19,744 crore outlay, aims for 5 million tonnes of annual production by 2030.
- U.S. and Chinese officials have established a framework to revive their trade truce, addressing China's rare earth export restrictions. The agreement, reached after intense London negotiations, aims to build upon a previous Geneva accord to ease retaliatory tariffs. While details remain pending presidential approval, the deal intends to remove some U.S. export controls.

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

Forthcoming Events

Board Meetings as on 12/06/2025

| | |
|------------------------------------|-------------------|
| Ashapura Intimates Fashion Limited | Financial Results |
| Kriti Industries (India) Limited | Fund Raising |

(Source: NSE)

Corporate Actions as on 12/06/2025

| | |
|---|--------------------------------|
| Ethos Limited | Rights 4:43@ Premium Rs 1790/- |
| JK Lakshmi Cement Limited | Dividend - Rs 6.50 Per Share |
| Tata Chemicals Limited | Dividend - Rs 11 Per Share |
| Trent Limited | Dividend - Rs 5 Per Share |
| ICICI Prudential Life Insurance Company Limited | Dividend - Re 0.85 Per Share |

(Source: NSE)

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