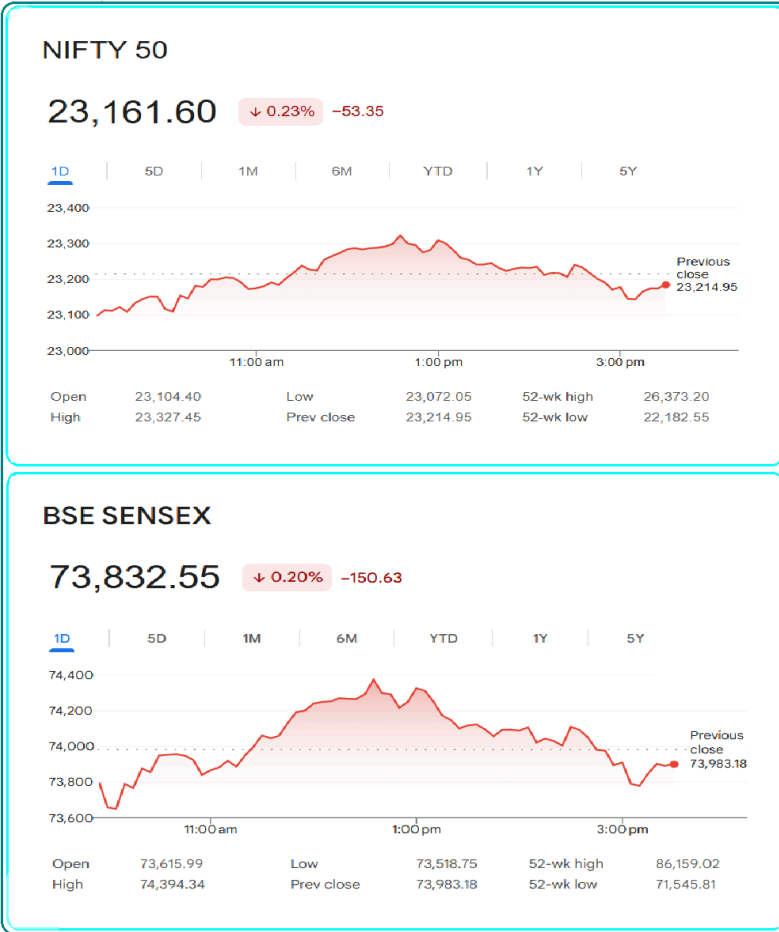


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23161.60	23214.95	-0.23%
S&P BSE SENSEX	73832.55	73983.18	-0.20%
NIFTY MID100	59325.40	59810.20	-0.81%
NIFTY SML100	17702.60	17822.50	-0.67%

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

Market Wrap Up

- The domestic equity benchmarks ended with moderate losses today amid cautious investor sentiment, as market participants monitored developments in West Asia. Trading remained volatile due to the weekly expiry of Sensex futures and options contracts. The Nifty ended below the 23,200 level.
- The S&P BSE Sensex declined 150.63 points or 0.20% to 73,832.55. The Nifty 50 index lost 53.35 points or 0.23% to 23,161.60.
- The BSE 150 MidCap Index fell 0.83% and the BSE 250 SmallCap Index shed 0.72%.
- Among the sectoral indices, the Nifty Media index (up 1.78%), the Nifty Nifty Pharma index (up 0.61%) and the Nifty Private Bank Index (up 0.55%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 1.62%), Nifty Chemical index (down 1.27%) and the Nifty Consumer Durables index (down 1.15%) 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 **714** contracts at the end of the day.
- **Long** position build up for the **June** series has been witnessed in **RELIANCE, ONGC, BHARTIARTL, ICICIBANK**.
- **Short** position build up for the **June** series has been witnessed in **SBIN, HDFCBANK, INFY**.
- **Unwinding** position for the **June** series has been witnessed in **HCLTECH, ADANIENT**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55176.75	55100.30	0.14%
NIFTY AUTO	25790.35	25833.55	-0.17%
NIFTY FMCG	48521.80	48957.00	-0.89%
NIFTY IT	27821.00	28279.90	-1.62%
NIFTY METAL	12733.60	12766.45	-0.26%
NIFTY PHARMA	24306.95	24160.75	0.61%
NIFTY REALTY	743.35	748.15	-0.64%
BSE CG	77161.16	78091.07	-1.19%
BSE CD	56949.39	57502.61	-0.96%
BSE Oil & GAS	25581.81	25757.44	-0.68%
BSE POWER	7783.37	7867.87	-1.07%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	64217.27	64179.27	0.06%
HANG SENG	24249.29	24407.96	-0.65%
STRAITS TIMES	4988.10	4958.85	0.59%
SHANGHAI	3987.01	3993.23	-0.16%
KOSPI	7763.95	7730.82	0.43%
JAKARTA	5886.03	5902.38	-0.28%
TAIWAN	43149.46	43225.54	-0.18%
KLSE COMPOSITE	1679.53	1678.96	0.03%
ALL ORDINARIES	8836.70	8857.00	-0.23%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	112502.22	119714.14
NSE F&O	112359.26	128693.64

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1987.09

(Source: [NSE](#))

Corporate News

- Tata Consultancy Services** has entered into a global strategic partnership with Anthropic to accelerate enterprise adoption of artificial intelligence using Anthropic's Claude family of AI models.
- Bharti Airtel** has renamed its "Priority postpaid plan" to "Postpaid Fast Lane". The company continues to offer enhanced network service to its postpaid users. Airtel states the new plan has received a satisfying response. The company has no plans to withdraw the offering. Postpaid users with 5G-capable devices will receive superior network experience.
- AstraZeneca Pharma India** has secured approval from India's drug regulator for its smart chemotherapy drug Enhertu. This allows for its import, sale, and distribution for an additional use. The drug will now be available as a first-line treatment for certain types of advanced breast cancer. This development expands treatment options for oncologists and patients facing HER2-positive breast cancer.
- Mahindra EPC Irrigation** said it has secured an order worth approximately Rs 3.32 crore, from the Office of the Executive Engineer, Water Resources Division.
- DOMS Industries** has entered into an asset purchase agreement (APA) with Reynolds Pens India to acquire certain assets under the Reynolds brand for total consideration of \$3.7 million.
- Glenmark Pharmaceuticals** announced that its wholly owned subsidiary Glenmark Specialty S.A (GSSA) has launched Winlevi (clascoterone 10 mg/g cream) across key markets in Europe for the treatment of acne vulgaris.
- Cipla** announced that the United States Food and Drug Administration (USFDA) classified the inspection of its manufacturing facility in Verna, Goa as voluntary action indicated (VAI).
- India Cements** has entered into energy supply agreement and share subscription and shareholders agreement to acquire 12.48% equity shares of FPEL SERVICES, a company engaged in generation and transmission of renewable energy.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ICICIBANK	1317.00	1293.30	1.83%
M&M	3000.90	2952.50	1.64%
KOTAKBANK	393.35	388.10	1.35%
JSWSTEEL	1282.30	1269.80	0.98%
GRASIM	3089.50	3071.20	0.60%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	1114.60	1145.30	-2.68%
HCLTECH	1110.20	1132.10	-1.93%
ETERNAL	235.20	239.80	-1.92%
ADANI PORTS	1787.10	1821.20	-1.87%
TRENT	2710.90	2754.70	-1.59%

(Source: [Moneycontrol](#))

- **CapitalNumbers Infotech** has secured an international order worth Rs 2.46 crore from a UK-based entity for an artificial intelligence project in the healthcare domain.

- **Adani Enterprises** announced that its wholly owned step-down subsidiary, Adani Airport City has completed the acquisition of 100% of the equity share capital of Portus Ventures (PVPL) on 10 June 2026.
- **Alembic Pharmaceuticals** advanced 1.15% to Rs 744.95 after the company announced that it has received tentative approval from the US Food & Drug Administration (USFDA) for its abbreviated new drug application (ANDA) Larotrectinib Capsules.
- **MTAR Technologies** emerged that US-based data centre developer Crusoe has paused work on Project Jade, a large-scale AI data centre campus planned in Cheyenne, Wyoming.
- **Vascon Engineers** announced that it had secured a Rs 347.43 crore contract from the Central Public Works Department (CPWD), Government of India.
- **3i Infotech** announced that it had secured a purchase order worth Rs 37.05 crore from Hindustan Petroleum Corporation (HPCL).

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

Global News

- U.S. annual inflation rate in the US rose to 4.2% in May 2026, marking its highest level since April 2023, from 3.8% in April. Compared to the previous month, the CPI was up 0.5%, slightly less than 0.6% in April. The annual core inflation rate went up to 2.9%, a new high since September 2025, compared to 2.8%. Compared to the previous month however, the core CPI rose 0.2%, less than 0.4% in April.
- U.S. government recorded a \$293 billion budget deficit in May 2026, compared with a \$316 billion gap a year earlier, but wider than forecasts of a \$275 billion shortfall.

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

Economic News

- Crude Oil traded at US\$ 89.13/bbl (IST 17:00).
- INR weakened to Rs. 95.77 from Rs. 95.28 against each US\$ resulting in daily change of 0.51%.
- India and the UAE are boosting energy security. Plans are underway to significantly expand India's strategic oil reserves with UAE-linked crude storage. New facilities will increase capacity from 5.8 million barrels to 30 million barrels. Both nations are also establishing a framework for strategic gas reserves. This initiative aims to provide greater flexibility and ensure stable energy supplies for India.
- The Reserve Bank of India has released a draft framework for bank control and assurance functions. This aims to simplify rules and boost governance. The new guidelines will be effective from January 1, 2027. Banks must ensure their risk management, compliance, and internal audit functions are robust.
- The Modi government has five-folded the agriculture ministry budget to Rs 1.4 lakh crore for 2026-27. Over 3,000 climate-resistant crop varieties were released. Farmers received Rs 4.3 lakh crore under PM-KISAN. Fertiliser subsidy rose to Rs 2.21 lakh crore. Foodgrain production reached a record 3,577 lakh tonnes. Agriculture exports grew by 37 percent.
- The Emergency Credit Line Guarantee Scheme (ECLGS) 5.0 has seen over 1 lakh guarantees issued, totaling Rs 48,484 crore in just one month. This initiative, aimed at addressing liquidity challenges from the West Asia crisis, primarily benefits the MSME sector, with public sector banks playing a significant role in its rapid adoption.
- The Reserve Bank of India now permits banks to directly fund Real Estate Investment Trusts and Infrastructure Investment Trusts. Strict rules are in place, including exposure limits and asset eligibility. These changes aim to boost credit access for income-generating trusts while ensuring financial stability. The new framework becomes effective from October 1, 2026.
- India has extended anti-dumping duties on aluminium foil imports. The measure will remain in effect until December 15, 2026. This decision impacts imports from China, Malaysia, Thailand, and Indonesia. The Ministry of Finance issued a notification amending previous customs regulations.
- India's outward FDI commitments saw a significant 49.02% month-on-month drop to USD 4.49 billion in May 2026, primarily due to reduced equity investments, loans, and guarantees. Despite this decline, total financial commitments by Indian entities overseas increased by 34.6% year-on-year.
- India has seen a significant rise in Foreign Direct Investment, attracting USD 843 billion between 2014-15 and 2025-26. Key government initiatives like Make in India and PLI schemes have boosted manufacturing and created numerous jobs. The nation's startup ecosystem is also thriving, with over 2.35 lakh recognized startups generating substantial employment.
- The Finance Ministry has extended the Credit Guarantee Scheme for Microfinance Institutions-2.0 until August 31, 2026, or until Rs 20,000 crore in guarantees are issued. The maximum loan amount for large NBFC-MFIs and MFIs has also been raised to Rs 1,000 crore. These changes aim to boost credit flow to the MFI sector, with Rs 770 crore already sanctioned.

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

Forthcoming Events

Board Meetings as on 12/06/2026

Ather Energy Limited	Fund Raising
Soma Textiles & Industries Limited	Dividend

(Source: NSE)

Corporate Actions as on 12/06/2026

ACC Limited	Dividend - Rs 7.50 Per Share
Adani Enterprises Limited	Dividend - Rs 1.30 Per Share
Adani Ports and Special Economic Zone Limited	Dividend - Rs 7.50 Per Share
Adani Total Gas Limited	Dividend - Rs 0.25 Per Share
Ambuja Cements Limited	Dividend - Rs 2 Per Share
Apcotex Industries Limited	Dividend - Rs 5.50 Per Share
Canara Bank	Dividend - Rs 4.20 Per Share
Cemindia Projects Limited	Dividend - Rs 3 Per Share
City Union Bank Limited	Bonus 1:3
DCB Bank Limited	Dividend - Rs 1.45 Per Share
Eimco Elecon (India) Limited	Dividend - Rs 4 Per Share
Elecon Engineering Company Limited	Dividend - Rs 1.5 Per Share
ICICI Prudential Asset Management Company Limited	Dividend - Rs 12.40 Per Share
JM Financial Limited	Dividend - Rs 1.75 Per Share
Lloyds Metals And Energy Limited	Dividend - Rs 1 Per Share
MM Forgings Limited	Interim Dividend - Rs 4 Per Share
Navin Fluorine International Limited	Dividend - Rs 8.60 Per Share
Orient Cement Limited	Dividend - Rs 0.50 Per Share
Petronet LNG Limited	Dividend - Rs 3 Per Share
Piramal Finance Limited	Dividend - Rs 11 Per Share
Punjab National Bank	Dividend - Rs 3 Per Share
Reliance Industrial Infrastructure Limited	Dividend - Rs 3.50 Per Share
Sumeet Industries Limited	Rights 8:25 @ Premium Rs 9.86/-
Tamilnad Mercantile Bank Limited	Dividend - Rs 12.50 Per Share
Tata Motors Limited	Dividend - Rs 4 Per Share
Tata Steel Limited	Dividend - Rs 4 Per Share
Trent Limited	Dividend - Rs 6 Per Share
Voltas Limited	Dividend - Rs 4 Per Share

(Source: NSE)

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