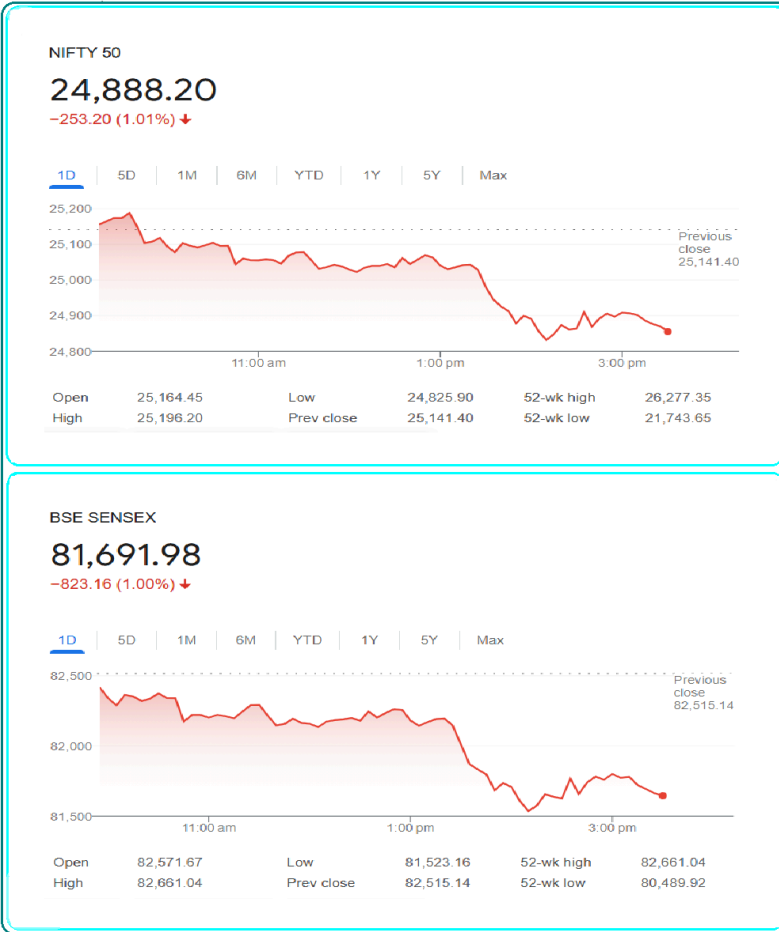


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24888.20	25141.40	-1.01%
S&P BSE SENSEX	81691.98	82515.14	-1.00%
NIFTY MID100	58440.85	59388.15	-1.60%
NIFTY SML100	18465.05	18798.75	-1.78%

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

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56082.55	56459.75	-0.67%

## Market Wrap Up

- The domestic equity benchmarks closed sharply lower today, weighed down by weak global cues. Investor sentiment remained subdued as markets assessed the limited clarity on the U.S.-China trade agreement and monitored escalating geopolitical tensions between the U.S. and Iran, which pushed crude oil prices higher. The Nifty ended below the 24,900 level. The market was volatile due to the weekly expiry of the Nifty F&O series today.
- The S&P BSE Sensex tanked 823.16 points or 1% to 81,691.98. The Nifty 50 index slumped 253.20 points or 1.01% to 24,888.20. The S&P BSE Mid-Cap index declined 1.52% and the S&P BSE Small-Cap index fell 1.38%.
- Among the sectoral indices, the Nifty Healthcare index (up 0.05%), the Nifty Media index (down 0.42%) and the Nifty Bank index (down 0.67%) outperformed the Nifty 50 index. Meanwhile, the Nifty realty index (down 2.02%), the Nifty Consumer Durables index (down 1.92%) and the Nifty Oil & Gas index (down 1.69%) and 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 **11010** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **DRREDDY, TECHM**.
- Short** position build up for the **June** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.
- Unwinding** position for the **June** series has been witnessed in **BAJAJFINSV, NBCC**.

(Source: Capitaline F&O)

NIFTY AUTO	23411.80	23805.20	-1.65%
NIFTY FMCG	55104.10	55820.60	-1.28%
NIFTY IT	38460.30	38784.30	-0.84%
NIFTY METAL	9348.50	9495.80	-1.55%
NIFTY PHARMA	22036.15	22057.15	-0.10%
NIFTY REALTY	1006.45	1027.25	-2.02%
BSE CG	69774.57	71160.97	-1.95%
BSE CD	57393.55	58579.10	-2.02%
BSE Oil & GAS	27316.67	27903.52	-2.10%
BSE POWER	6776.41	6928.01	-2.19%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38173.09	38421.19	-0.65%
HANG SENG	24035.38	24366.94	-1.36%
STRAITS TIMES	3922.20	3919.05	0.08%
SHANGHAI	3402.66	3402.32	0.01%
KOSPI	2920.03	2907.04	0.45%
JAKARTA	7204.37	7222.46	-0.25%
TAIWAN	22287.82	22471.10	-0.82%
KLSE COMPOSITE	1526.62	1523.84	0.18%
ALL ORDINARIES	8796.00	8819.70	-0.27%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	117580.76	124232.01
NSE F&O	193907.61	149616.96

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	3831.42

(Source: [NSE](#))

## Corporate News

- **Adani Cement** contributed to the Chenab Bridge construction. Ambuja Cements and ACC supplied 65,000 metric tonnes of cement. The cement was Ordinary Portland Cement 43 Grade. The bridge connects Kashmir Valley with the rest of India.
- **Sterlite Technologies Limited** and **Dilip Buildcon** have inked a Rs. 2,631.14 Crore pact with Bharat Sanchar Nigam Limited (BSNL) for the BharatNet middle-mile network in Jammu & Kashmir and Ladakh telecom circles - package 13.
- **Maruti Suzuki** has received approval for its first motion application for the amalgamation of Suzuki Motor Gujarat Private Limited into Maruti Suzuki India. The National Company Law Tribunal (NCLT)'s Principal Bench in New Delhi has given the approval. The NCLT abolished the need for an equity shareholders meeting to pass such an order.
- **Zydu Lifesciences** has received the Establishment Inspection Report (EIR) from the United States Food and Drug Administration (USFDA) for its active pharma ingredient (API) manufacturing facility situated in Ankleshwar, Gujarat.
- **RailTel** has bagged a work order worth Rs. 119.49 Crore from South Eastern Coalfields Limited (SECL) for supplying managed bandwidth services under an operating expenditure model (opex). As per its filing, the project is to be located across Madhya Pradesh and Chhattisgarh.
- **Canara Bank** announced a 50 basis points (bps) reduction in its Repo Linked Lending Rate (RLLR), bringing it down from 8.75% to 8.25%, in line with the Reserve Bank of India's latest repo rate cut. The new rates, effective from 12 June 2025, will reduce EMIs or loan tenures for borrowers, offering major relief to home and personal loan customers.
- **Anupam Rasayan India** has signed a Letter of Intent (LOI) with E-Lyte Innovations GmbH (E-Lyte) a European developer and supplier of electrolyte solutions for energy storage and FUCHS LUBRICANTS GERMANY GmbH. a subsidiary of FUCHS SE.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
APOLLOHOSP	6996.50	6927.50	1.00%
DRREDDY	1362.70	1351.10	0.86%
BAJAJFINSV	2028.80	2012.90	0.79%
ASIANPAINT	2219.40	2208.80	0.48%
TECHM	1644.40	1637.50	0.42%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
TATAMOTORS	715.35	736.40	-2.86%
SHRIRAMFIN	668.05	686.05	-2.62%
TRENT	5627.50	5776.50	-2.58%
TITAN	3452.70	3541.60	-2.51%
COALINDIA	392.70	402.10	-2.34%

(Source: [Moneycontrol](#))

- **Airtel** Digital TV is removing Zee Entertainment channels from its packages due to a recent price hike, mirroring a similar dispute between Sony and Tata Play. Airtel will adjust pack prices and offer Zee channels on an a la carte basis. This move comes as DTH operators resist price increases amid declining pay-TV subscribers and rising competition from OTT platforms.

- **NTPC** said that the trial operations of Unit-2 of the 660 MW capacity unit of North Karanpura Super Thermal Power Project have been successfully completed and consequently included in the installed capacity of the company.
- **Waaree Energies** said it has signed and executed a power purchase agreement (PPA) with Rewa Ultra Mega Solar (RUMSL) and Madhya Pradesh Power Management Company (MPPMCL) for the supply of 150 MW of solar power.
- **Shakti Pumps India** has received a letter of award (LoA) worth Rs 114.58 crore from the Maharashtra Energy Department Agency (MEDA).
- **H.G. Infra Engineering** has announced that it has been declared the lowest (L1) bidder for the role of Transmission Service Provider (TSP) for the development of an Inter-State Transmission System (ISTS) in the state of Odisha.
- **SEPC** has secured a significant order worth Rupees 650 crore. The company will establish 133 MW of solar power capacity across Maharashtra. Parmeshi Urja Limited, Kolkata, awarded the EPC solar power projects. The projects span 26 locations in four districts. This initiative aligns with the PM-KUSUM Yojana. The project is expected to be completed within 12 to 18 months.

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

## Global News

- U.S. consumer price index inched up by 0.1% in May after rising by 0.2% in April. The annual rate of consumer price growth accelerated to 2.4% in May from 2.3% in April. Core consumer prices still crept up by 0.1% in May after edging up by 0.2% in April. The annual rate of core consumer price growth in May was unchanged from the previous month at 2.8%.
- U.S. government recorded a \$316 billion budget deficit in May, down 9% from a year earlier.
- U.K. economy contracted by 0.3% mom in April 2025, follows a 0.2% expansion in March. GDP grew by 0.7% in the three months to April while GDP expanded 0.9% year-on-year in April 2025, following a 1.1% rise in March.
- U.K. trade deficit widened sharply to GBP 7.03 billion in April 2025 from GBP 3.70 billion in March.
- U.K. industrial production declined by 0.6% month-on-month in April 2025, slightly easing from a 0.7% fall in the previous

month. On an annual basis, industrial production fell by 0.3% in April, slowing from a 0.7% decline in March,.

- U.K. manufacturing production fell 0.9% month-over-month in April 2025, following a 0.8% decrease in the previous month. On a yearly basis, manufacturing output rose by 0.4% in April, rebounding from a 0.8% fall in March.

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

## Economic News

- Crude Oil traded at US\$ 66.92/bbl (IST 17:00).
- INR weakened to Rs. 85.60 from Rs. 85.51 against each US\$ resulting in daily change of 0.11%.
- India's retail inflation fell to a six-year low of 2.82% in May 2025, compared to April 2025. The CPI increased 0.21% in May of 2025 over the previous month, following a 0.31% rise in April.
- India's palm oil imports surged to a six-month peak in May, driven by attractive pricing compared to soyoil and sunflower oil, alongside dwindling inventories. This surge propelled overall vegetable oil imports to 1.19 million tons, the highest since December. Anticipated increased palm oil imports in June, potentially reaching 850,000 tons, are expected due to the continued price advantage.
- Private consumption in the Indian economy moderated slightly in the fourth quarter of FY25. The real private consumption spending grew by 5.9% in Q4FY25, a marginal dip from 6.2% growth recorded in Q4FY24.

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

## Forthcoming Events

### Board Meetings as on 13/06/2025

Libas Consumer Products Limited	Financial Results
The State Trading Corporation of India Limited	Financial Results

(Source: NSE)

### Corporate Actions as on 13/06/2025

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 Per Share
Adani Total Gas Limited	Dividend - Re 0.25 Per Share
Ambuja Cements Limited	Dividend - Rs 2 Per Share

Apcotex Industries Limited	Dividend - Rs 4.50 Per Share
Canara Bank	Dividend - Rs 4 Per Share
Dam Capital Advisors Limited	Dividend - Re 1 Per Share
Eimco Elecon (India) Limited	Dividend - Rs 5 Per Share
Elecon Engineering Company Limited	Dividend - Rs 1.50 Per Share
Indegene Limited	Dividend - Rs 2 Per Share
JM Financial Limited	Dividend - Rs 2.70 Per Share
Piramal Enterprises Limited	Dividend - Rs 11 Per Share
Power Finance Corporation Limited	Dividend - Rs 2.05 Per Share
Sharda Motor Industries Limited	Dividend - Rs 32.50 Per Share
SMC Global Securities Limited	Dividend - Rs 1.20 Per Share
Steel City Securities Limited	Dividend - Re 1 Per Share
Vimta Labs Limited	Bonus 1:1

(Source: NSE)

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