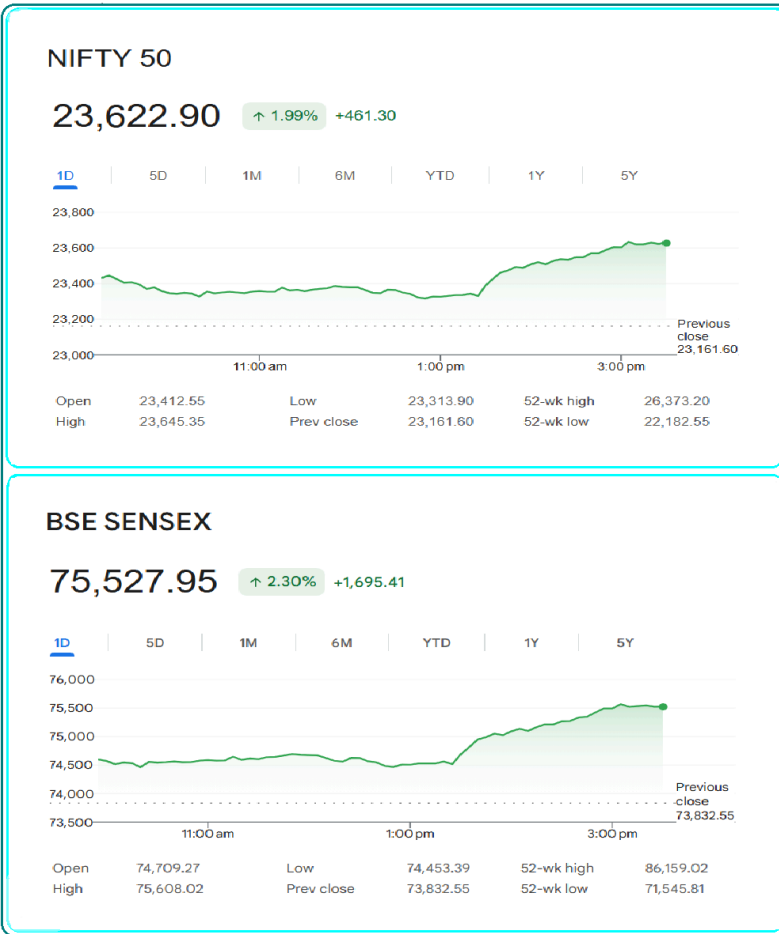


Index Chart



(Source: [Bloomberg](#))

Indian Markets

| Indices | Close | Previous | Change(%) |
|---------------------------|----------|----------|--------------|
| NIFTY 50 | 23622.90 | 23161.60 | 1.99% |
| S&P BSE SENSEX | 75527.95 | 73832.55 | 2.30% |
| NIFTY MID100 | 60768.10 | 59325.40 | 2.43% |
| NIFTY SML100 | 18197.45 | 17702.60 | 2.80% |

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

Market Wrap Up

- The headline equity indices ended with robust gains today, supported by hopes of a U.S.-Iran peace deal, easing crude oil prices and positive global cues that boosted investor sentiment. The Nifty ended above the 23,600 level.
- The S&P BSE Sensex jumped 1,695.40 points or 2.30% to 75,527.95. The Nifty 50 index soared 461.30 points or 1.99% to 23,622.90.
- The BSE 150 MidCap Index surged 2.37% and the BSE 250 SmallCap Index climbed 2.60%.
- Among the sectoral indices, the Nifty Realty index (up 3.53%), the Nifty Financial Services index (up 3.15%) and the Nifty Private Bank Index (up 2.84%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 0.09%), Nifty Pharma index (up 0.30%) and the Nifty Healthcare Index (up 0.33%) 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 **121** contracts at the end of the day.
- **Long** position build up for the **June** series has been witnessed in **RELIANCE, SBIN, ICICIBANK, HDFCBANK, INFY**.
- **Short** position build up for the **June** series has been witnessed in **ONGC, BAJAJ-AUTO**.
- **Unwinding** position for the **June** series has been witnessed in **BHARTIARTL, POWERINDIA**.

(Source: Capitaline F&O)

Sectoral Indices

| Indices | Close | Previous | Change(%) |
|---------------|----------|----------|-----------|
| NIFTY BANK | 56814.80 | 55176.75 | 2.97% |
| NIFTY AUTO | 26293.85 | 25790.35 | 1.95% |
| NIFTY FMCG | 48827.60 | 48521.80 | 0.63% |
| NIFTY IT | 27795.75 | 27821.00 | -0.09% |
| NIFTY METAL | 12854.50 | 12733.60 | 0.95% |
| NIFTY PHARMA | 24380.05 | 24306.95 | 0.30% |
| NIFTY REALTY | 769.60 | 743.35 | 3.53% |
| BSE CG | 78891.93 | 77161.16 | 2.24% |
| BSE CD | 58426.47 | 56949.39 | 2.59% |
| BSE Oil & GAS | 26151.06 | 25581.81 | 2.23% |
| BSE POWER | 7920.40 | 7783.37 | 1.76% |

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

Asia Pacific Markets

| Indices | Close | Previous | Change (%) |
|----------------|----------|----------|------------|
| NIKKEI225 | 66020.04 | 64217.27 | 2.81% |
| HANG SENG | 24178.10 | 24249.29 | -0.29% |
| STRAITS TIMES | 5025.80 | 4988.10 | 0.76% |
| SHANGHAI | 4031.51 | 3987.01 | 1.12% |
| KOSPI | 8123.62 | 7763.95 | 4.63% |
| JAKARTA | 6007.66 | 5886.03 | 2.07% |
| TAIWAN | 44169.04 | 43149.46 | 2.36% |
| KLSE COMPOSITE | 1683.63 | 1679.53 | 0.24% |
| ALL ORDINARIES | 9006.10 | 8836.70 | 1.92% |

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

| Market | Current | Previous |
|----------|-----------|-----------|
| NSE Cash | 118837.67 | 112502.22 |
| NSE F&O | 178414.07 | 112359.26 |

(Source: [NSE](#))

FII Activities (Crores)

| ACTIVITIES | Cash |
|------------|---------|
| NET BUY | - |
| NET SELL | 1082.18 |

(Source: [NSE](#))

Corporate News

- Tata Consultancy Services** has expanded its collaboration with Oracle by launching India's first Oracle AI Data Platform Lab and Center of Excellence (CoE) in Kolkata. The new facility is designed to help organizations shape the next wave of AI-powered enterprise transformation. TCS also plans to roll out the Oracle AI Data Platform Labs and CoEs across four additional cities in India over the next three years.
- Hindustan Zinc** has partnered with Sulfozyme Agro India. This collaboration aims to boost sustainable metal recovery. Sulfozyme Agro will operate at Hindustan Zinc's Zinc Industrial Park. They will process zinc materials into value-added products. Hindustan Zinc will provide raw material support. This initiative strengthens the MSME ecosystem in Rajasthan. It promotes industrial growth and entrepreneurship.
- Vodafone Idea** shareholders approved a Rs. 4,730-crore investment from the Aditya Birla Group via preferential allotment of warrants, increasing AB Group's stake to around 13%. Chairman Kumar Mangalam Birla stated the company's focus now shifts to execution across operations, customer service, and network expansion. This capital infusion will support capital expenditure and loan repayment, reinforcing Vi's financial health.
- Concord Biotech** announced the successful completion of an inspection conducted by Brazil's National Health Surveillance Agency (ANVISA) at its active pharmaceutical ingredient (API) manufacturing facility in Limbasi.
- Alembic Pharmaceuticals** announced that it had received final approval from the US Food and Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) for Tretinoin Cream USP, 0.05%.
- Tata Motors Passenger Vehicles** said it will increase prices of its cars and SUVs by up to 1.5% from July 1, 2026, across its internal combustion engine (ICE) and electric vehicle (EV) portfolio.
- Hitachi Energy India** is investing approximately Rs 2000 crore to establish a new Large Power Transformer (LPT) factory in Karjan, Vadodara, India. This investment is in continuation of the recent announcement made by Hitachi Energy India during its FY26 Q4 results. The

Top Gainers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|--------|----------|------------|
| WIPRO | 180.14 | 177.37 | 1.56% |
| JIOFIN | 235.89 | 228.02 | 3.45% |
| ETERNAL | 243.80 | 235.20 | 3.66% |
| ITC | 285.10 | 282.40 | 0.96% |
| NTPC | 353.90 | 351.85 | 0.58% |

(Source: [Moneycontrol](#))

Top Losers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|---------|----------|------------|
| NESTLEIND | 1375.70 | 1422.50 | -3.29% |
| ONGC | 246.20 | 252.60 | -2.53% |
| TECHM | 1429.20 | 1465.10 | -2.45% |
| SBILIFE | 1706.00 | 1719.10 | -0.76% |
| TATACONSUM | 1100.70 | 1108.60 | -0.71% |

(Source: [Moneycontrol](#))

- **LTM** announced AI 1000, a strategic workforce transformation initiative anchored by a dedicated Center of Excellence (CoE). The program will develop a pool of 1,000+ AI-certified engineers, including Forward Deployed Engineers (FDEs), to help enterprises adopt, deploy, and scale AI.
- **PCBL Chemical** has commissioned a new specialty production line with a gross capacity of 20,000 metric tonnes per annum (MTPA) at its Mundra plant in Gujarat.

investment builds on the company's 77-year history in India and its commitment to strengthening its manufacturing footprint to support the growing demand for electricity in the country and worldwide.

- **Dabur India** said the United States Food and Drug Administration (USFDA) issued Import Alert 66-40 for drugs made at part of its Silvassa facility after an inspection flagged data integrity and maintenance deficiencies.
- **Bharat Heavy Electricals** has received a Limited Notice to Proceed (LNTP) worth over Rs 90 crore (excluding GST) from Damodar Valley Corporation (DVC) for the 1x800 MW Durgapur Supercritical Thermal Power Station project.
- **Bajaj Auto** Foundation has committed Rs. 400 crore over the next decade towards a scholarship programme for women pursuing core engineering disciplines, while outlining plans to invest nearly Rs. 1,500 crore in skilling, education and community development initiatives over the next five years.
- **State Bank of India** said that the Government of India has appointed senior IAS officer Sanjay Lohiya as a government-nominated director on the Central Board of the bank.

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

Global News

- China's new yuan loans extended by Chinese banks rose by a net CNY 520 billion in May of 2026, slowing from the CNY 623 billion from the corresponding period of the previous year. Aggregate financing rose by a net CNY 2.03 trillion, less than the CNY 22.9 trillion from last year. The value of loans increased 5.50% in May of 2026 over the same month in the previous year. The M2 money supply balance reached 353.67 trillion CNY by the end of May, representing a 8.6% year-on-year increase.
- U.S. initial jobless claims crept up to 229,000 in the week ended June 6th, an increase of 4,000 from the previous week's unrevised level of 225,000. Continuing claims rose to 24,000 to 1,795,000
- U.S. producer prices for final demand increased 1.1% mom in May 2026, the same as a downwardly revised 1.1% rise in April. Year-on-year, the PPI rose 6.5%. Meanwhile, core PPI increased 0.4% on the month, compared to 4.9% yoy.

- U.K. GDP contracted by 0.1% month-on-month in April 2026, in line with expectations and following a 0.3% expansion in March. On a yearly basis, GDP expanded 1.2%, the same pace as in March.
- U.K. trade deficit declined to GBP 8.44 billion in April 2026, down from GBP 9.66 billion in the previous month. Exports grew 1.1% month-on-month to a three-month high of GBP 79.97 billion, while imports fell 0.4% to GBP 88.41 billion.
- U.K. industrial production stalled month-over-month in April 2026, missing market expectations for a 0.1% gain and following a 0.2% decline in the previous month. On a yearly basis, industrial output fell 0.2% in April, following a flat reading in the preceding period.
- U.K. manufacturing production rose by 0.4% month-over-month in April 2026, beating market expectations for a 0.2% decline but slowing from a 1.2% increase in the previous month. On a yearly basis, manufacturing output increased by 1.0% in April 2026, easing slightly from a 1.2% gain in March.
- The European Central Bank raised interest rates by 25 basis points to 2.25%. The main refinancing rate was lifted to 2.40% and the marginal lending rate to 2.65%.
- Germany's annual inflation rate rose 2.6% in May 2026, easing from a two-year high of 2.9% in the previous month. On a monthly basis, consumer prices fell 0.2% in May, following a 0.6% increase in the previous month.
- Germany's current account surplus narrowed to €13.8 billion in April 2026, down from €18.7 billion in the same month last year.
- France's annual inflation rate rose to 2.4% in May 2026, picking up from 2.2% in April. On a monthly basis, the CPI increased by 0.1% in May, slowing sharply from 1.0% in April.
- Japan's industrial production rose 0.5% month-over-month in April 2026, below flash data of 0.8% but reversing from a 0.4% drop in the previous month. On an annual basis, output increased 2.0%, following a 2.4% rise in March.

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

Economic News

- Crude Oil traded at US\$ 84.13/bbl (IST 17:00).
- INR strengthened to Rs. 95.12 from Rs. 95.77 against each US\$ resulting in daily change of 0.68%.
- India's retail inflation accelerated to 3.93% in May from 3.48% in the previous month.
- India has placed restrictions on institutional and commercial buyers of fuel. These customers must now source motor spirit and high-speed diesel from their own consumer pumps. The measure is in effect for an initial period of up to 90 days. Retail outlets are also limited to selling a maximum of 200 litres of high-speed diesel per customer or vehicle daily.
- India's drug price regulator has increased the ceiling prices of cancer drugs cisplatin and carboplatin by 50% to tackle shortages caused by a sharp rise in platinum costs. The National Pharmaceutical Pricing Authority (NPPA) approved the one-time hike in public interest after supply disruptions affected hospitals across the country.
- India faces a larger budget deficit this year. The war in Iran is increasing energy subsidy costs. This puts pressure on

government finances. Authorities may allow the deficit to widen by half a percentage point. The deficit could reach 4.8% of GDP. This is up from the 4.3% target set in February. The situation is being closely watched.

- India has granted retrospective customs duty relief on specified nuclear power generation equipment imported between April 1, 2019 and January 31, 2026. The move exempts eligible imports from any duty demands for the period, providing certainty to importers and regularising past shipments used in nuclear power projects.
- The World Bank raised India's FY27 growth forecast to 6.6% from 6.5% estimated in January, citing reduced US tariffs and the anticipated benefits of upcoming free trade agreements. These factors are expected to cushion the impact of weaker external demand stemming from the ongoing Middle East conflict.

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

Forthcoming Events

Board Meetings as on 13/06/2026

Krishna Institute of Medical Sciences Limited

Fund Raising

Board Meetings as on 15/06/2026

Shree Ram Proteins Limited

Financial Results

(Source: NSE)

Corporate Actions as on 15/06/2026

SMC Global Securities Limited

Dividend - Re 0.60 Per Share

(Source: NSE)

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