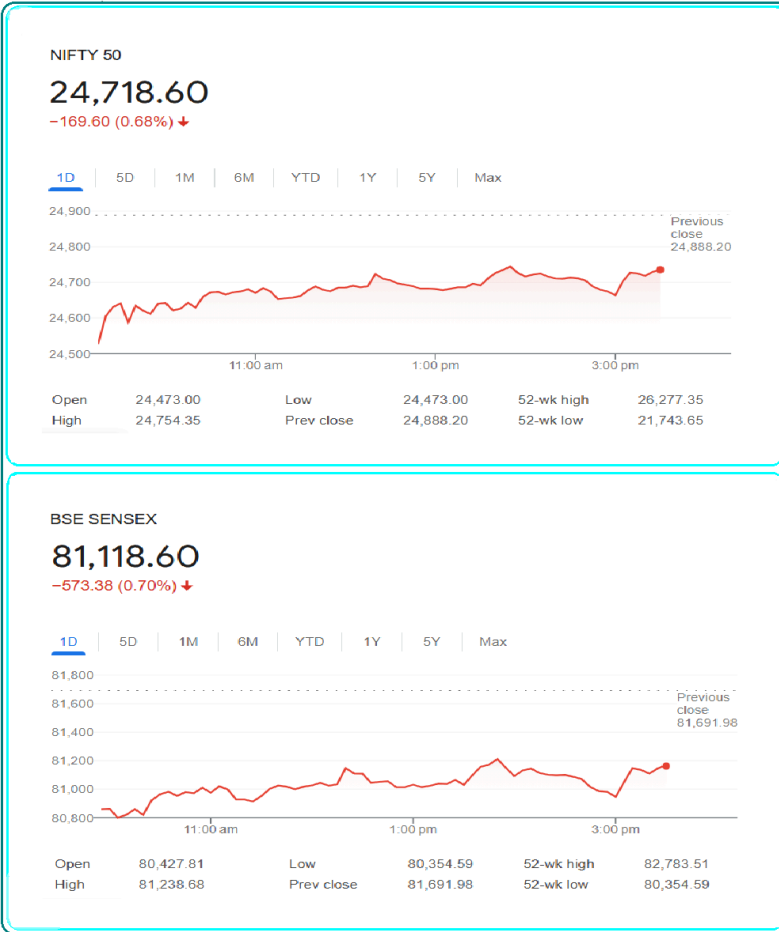


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24718.60	24888.20	<b>-0.68%</b>
<b>S&amp;P BSE SENSEX</b>	81118.60	81691.98	<b>-0.70%</b>
<b>NIFTY MID100</b>	58227.45	58440.85	<b>-0.37%</b>
<b>NIFTY SML100</b>	18374.80	18465.05	<b>-0.49%</b>

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

## Sectoral Indices

Indices	Close	Previous	Change(%)
<b>NIFTY BANK</b>	55527.35	56082.55	<b>-0.99%</b>

## Market Wrap Up

- The key equity indices ended with substantial losses today, dragged down by escalating geopolitical tensions that dampened investor confidence. The decline mirrored a broad sell-off across Asian and European markets after Israel launched military strikes on Iran, intensifying instability in the oil-rich Middle East. The heightened tensions also led to a spike in oil prices. The Nifty settled below the 24,750 mark.
- The S&P BSE Sensex, slumped 573.38 points or 0.70% to 81,118.60. The Nifty 50 index fell 169.60 points or 0.68% to 24,718.60.
- The S&P BSE Mid-Cap index slipped 0.32% and the S&P BSE Small-Cap index dropped 0.30%.
- Among the sectoral indices, the Nifty Media index (up 0.17%), the Nifty Realty index (up 0.06%) and the Nifty Healthcare index (up 0.04%) outperformed the Nifty 50 index. Meanwhile, the Nifty PSU Bank index (down 1.18%), the Nifty FMCG index (down 1.05%) and the Nifty Bank index (down 0.99%) 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 **12497** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **ONGC, TCS, 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 **CDSL, BHARATFORG**.

(Source: Capitaline F&O)

NIFTY AUTO	23327.40	23411.80	-0.36%
NIFTY FMCG	54527.15	55104.10	-1.05%
NIFTY IT	38469.25	38460.30	0.02%
NIFTY METAL	9258.80	9348.50	-0.96%
NIFTY PHARMA	21985.15	22036.15	-0.23%
NIFTY REALTY	1007.05	1006.45	0.06%
BSE CG	69767.45	69774.57	-0.01%
BSE CD	57110.34	57393.55	-0.49%
BSE Oil & GAS	27162.24	27316.67	-0.57%
BSE POWER	6725.34	6776.41	-0.75%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	37834.25	38173.09	-0.89%
HANG SENG	23892.56	24035.38	-0.59%
STRAITS TIMES	3911.42	3922.20	-0.27%
SHANGHAI	3377.00	3402.66	-0.75%
KOSPI	2894.62	2920.03	-0.87%
JAKARTA	7166.06	7204.37	-0.53%
TAIWAN	22072.95	22287.82	-0.96%
KLSE COMPOSITE	1518.11	1526.62	-0.56%
ALL ORDINARIES	8770.60	8796.00	-0.29%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	104981.80	117580.76
NSE F&O	161775.91	193907.61

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1263.52

(Source: [NSE](#))

## Corporate News

- **HCLTech** has been selected by Volvo Cars as strategic supplier of engineering services. With this agreement, the two companies expand their existing collaboration in digital and product life cycle management services (PLM).
- **Bajaj Finance** has cut deposit rates for the third time since the beginning of 2025. It has slashed deposit rates by 60 basis points, reduced the extra benefits for senior citizens to 35 basis points from 50 basis points and done away with the special tenures of 18-month and 33-month deposits.
- **Reliance Industries** sold a 3.64 percent stake in Asian Paints. The sale occurred through its affiliate Siddhant Commercials Pvt Ltd. SBI Mutual Fund acquired these shares for Rs 7,703 crore via an open market transaction. Following the deal, SBI Mutual Fund's stake in Asian Paints increased significantly.
- **Crompton Greaves Consumer Electricals Limited** has received a Letter of Award (LoA) from the Maharashtra Energy Development Agency (MEDA). The order is for the supply and installation of 4,500 off-grid solar photovoltaic water pumping systems across Maharashtra. The contract is valued at Rs. 100.68 Crore.
- **DCM Shriram Limited** has received approval from its board of directors for the acquisition of a 100% stake in Hindusthan Specialty Chemicals Ltd (HSCL). The transaction took place at an approximate value of Rs. 375 Crore. With this, the company marks its strategic diversion into the advanced materials segment.
- **Jubilant Pharmova Limited** has received board approval for sale and transfer of active pharmaceutical ingredient (API) business to its 100% subsidiary, Jubilant Biosys Limited. The transaction will take place on a slump sale basis.
- **Torrent Power Limited** said that its 100% subsidiary Torrent Green Energy Private Limited has secured a 300 MW wind power project from the Solar Energy Corporation of India (SECI) under Wind Tranche-XVIII. Torrent Power stated that it is planning investment of Rs. 2,650 Crore for successful execution of the stated project.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BEL	394.20	387.40	1.76%
ONGC	251.51	247.88	1.46%
TECHM	1659.00	1644.40	0.89%
TCS	3445.70	3434.20	0.33%
WIPRO	260.21	259.61	0.23%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
ADANI PORTS	1405.00	1445.80	-2.82%
ITC	413.90	421.00	-1.69%
SBIN	792.35	805.95	-1.69%
INDUSINDBK	816.85	829.90	-1.57%
HINDALCO	641.80	651.05	-1.42%

(Source: [Moneycontrol](#))

- **NBCC (India)** announced that it has secured a new work from Navodaya Vidyalaya Samiti in four states worth Rs 518.49 crore.
- **Sasken Technologies** announced a strategic partnership with Microsoft through the Microsoft Devices Ecosystem Platform (MDEP) to launch cutting-edge, next-generation smart devices.
- **Diamond Power Infrastructure** announced that it has received new orders worth Rs 116.71 crore.

- **Bank of Maharashtra** has reduced its retail loan interest rates by up to 50 basis points, effective June 10, with home loans starting at 7.35% and car loans at 7.7%. This move follows the RBI's recent rate moderation. Bank of Baroda also cut its MCLR by 5 basis points across various tenors.
- **Bharat Biotech** and GSK plc have partnered to develop a vaccine for Shigellosis, a severe bacterial diarrhea. The altSonflex1-2-3 vaccine candidate, developed by GSK, will be further developed by Bharat Biotech, including Phase 3 trials and manufacturing. This collaboration aims to address the urgent need for a Shigella vaccine due to rising antimicrobial resistance.
- **Kernex Microsystems (India)** said it secured two contracts from Southern Railways in a joint venture with VRRRC, under the KERNEX-VRRRC consortium. The total combined value of the orders is Rs 311.03 crore.
- **Sigachi Industries** has secured the Terms of Reference (ToR) approval from the State Environment Impact Assessment Authority (SEIAA), Andhra Pradesh.
- **RPP Infra Projects** has received letter of acceptance worth Rs 282.88 crore from the principal general manager UPSIDA Complex Kanpur.
- **Coal India** has announced the formation of a new subsidiary, CIL Rajasthan Akshay Urja, to manage its renewable energy business in the state of Rajasthan.

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

## Global News

- Chinese banks extended 620 billion yuan (\$86.34 billion) in new loans in May, rising from April's 280 billion yuan. Outstanding loan growth increased 7.1% in May of 2025 over the same month in the previous year. Money Supply M2 increased 8% year-on-year to 325173.932 CNY Billion in April 2025, above a 7% rise in March. Total social financing increased to 22900 CNY Hundred Million in May from 11600 CNY Hundred Million in April of 2025.
- U.S. initial jobless claims came at 248,000 in the week ended June 7th, unchanged from the previous week's revised level. Continuing claims climbed by 54,000 to 1.956 million in the week ended May 31st.
- U.S. producer price index for final demand inched up by 0.1% after slipping by a revised 0.2% in April. The annual rate of growth by producer prices accelerated to 2.6% in May from 2.5% in April. The core producer prices inched up by 0.1% in

May after edging down by 0.1% in April. The annual rate of growth by core producer prices slowed to 2.7% in May from 2.9% in April.

- Eurozone's trade surplus narrowed to EUR 9.9 billion in April 2025, down from EUR 13.6 billion a year earlier
- Eurozone industrial production dropped by 2.4% month-over-month in April 2025, reversing a downwardly revised 2.4% gain in March. On an annual basis, industrial output growth slowed to 0.8% in April from 3.7% in March.
- Germany's current account surplus narrowed slightly to EUR 23.5 billion in April 2025, down from a revised EUR 24.6 billion a year earlier.
- Japan's industrial production fell by 1.1% month-over-month in April 2025, reversing a 0.2% gain in the previous month. On a year-on-year basis, industrial output grew by 0.5%, easing from a 1.0% increase in March but still marking the fourth consecutive month of annual growth.

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

## Economic News

- Crude Oil traded at US\$ 73.52/bbl (IST 17:00).
- INR weakened to Rs. 86.08 from Rs. 85.60 against each US\$ resulting in daily change of 0.67%.
- India and the US are facing hurdles in trade negotiations as they aim for an interim deal before potential US tariffs in July. Sticking points include US demands for market access for genetically-modified crops and relaxed regulations on medical devices and data localization. India seeks exemptions from US tariffs on steel, automobiles, and pharmaceuticals, threatening reciprocal measures.
- The government has approved the procurement of 54,166 tonnes of moong from Haryana, Gujarat, and Uttar Pradesh, along with 50,750 tonnes of groundnut from Uttar Pradesh, under the Price Support Scheme (PSS) for the 2025-26 season. Agriculture Minister Shivraj Singh Chouhan also extended the procurement period in Andhra Pradesh by 15 days.

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

# Forthcoming Events

## Board Meetings as on 14/06/2025

CEAT Limited	Fund Raising
Sri Adhikari Brothers Television Network Limited	Fund Raising

## Board Meetings as on 15/06/2025

Railtel Corporation Of India Limited	Dividend
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## Board Meetings as on 16/06/2025

Zee Entertainment Enterprises Limited	Fund Raising
Belrise Industries Limited	Financial Results
Ram Ratna Wires Limited	Financial Results
Tanla Platforms Limited	Buyback
Vipul Limited	Financial Results/Dividend

(Source: NSE)

## Corporate Actions as on 16/06/2025

Bajaj Finance Limited	Bonus 4:1/Face Value Split (Sub-Division) - From Rs 2/- Per Share To Re 1/- Per Share
Honeywell Automation India Limited	Dividend - Rs 105 Per Share
Tata Technologies Limited	Dividend - Rs 8.35 Per Share & Special Dividend - Rs 3.35 Per Share

(Source: NSE)

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