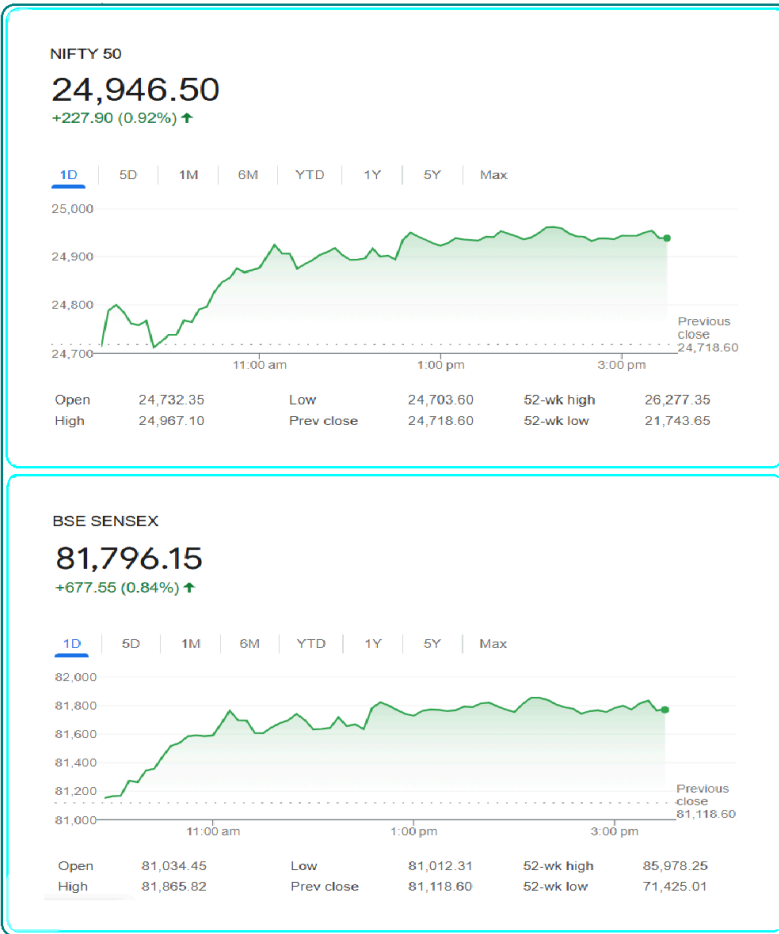


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24946.50	24718.60	<b>0.92%</b>
<b>S&amp;P BSE SENSEX</b>	81796.15	81118.60	<b>0.84%</b>
<b>NIFTY MID100</b>	58768.50	58227.45	<b>0.93%</b>
<b>NIFTY SML100</b>	18549.20	18374.80	<b>0.95%</b>

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

## Sectoral Indices

Indices	Close	Previous	Change(%)
<b>NIFTY BANK</b>	55944.90	55527.35	<b>0.75%</b>

## Market Wrap Up

- The domestic equity benchmarks ended with major gains today, snapping a two-day losing streak. This rebound came despite ongoing concerns over escalating geopolitical tensions between Israel and Iran. Investors remained focused on crude oil prices, bond market movements, and the outcome of the upcoming U.S. Federal Reserve meeting later this week. The Nifty settled above the 24,900 level.
- The S&P BSE Sensex gained 677.55 points or 0.84% to 81,796.15. The Nifty 50 index jumped 227.90 points or 0.92% to 24,946.50.
- The S&P BSE Mid-Cap index rose 0.87% and the S&P BSE Small-Cap index added 0.15%.
- Among the sectoral indices, the Nifty IT index (up 1.57%), the Nifty Realty index (up 1.32%) and the Nifty Oil & Gas index (up 1.11%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Auto index (up 0.18%), the Nifty Pharma index (up 0.25%) and the Nifty PSU Bank index (up 0.26%) 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 **2804** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **ONGC, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.
- Short** position build up for the **June** series has been witnessed in **BAJFINANCE, TATAMOTORS, GODREJCP**.
- Unwinding** position for the **June** series has been witnessed in **RELIANCE, LT**.

(Source: Capitaline F&O)

NIFTY AUTO	23368.25	23327.40	0.18%
NIFTY FMCG	54873.30	54527.15	0.63%
NIFTY IT	39073.05	38469.25	1.57%
NIFTY METAL	9358.25	9258.80	1.07%
NIFTY PHARMA	22039.45	21985.15	0.25%
NIFTY REALTY	1020.30	1007.05	1.32%
BSE CG	70336.95	69767.45	0.82%
BSE CD	57708.17	57110.34	1.05%
BSE Oil & GAS	27493.10	27162.24	1.22%
BSE POWER	6764.36	6725.34	0.58%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38311.33	37834.25	1.26%
HANG SENG	24060.99	23892.56	0.70%
STRAITS TIMES	3908.46	3911.42	-0.08%
SHANGHAI	3388.73	3377.00	0.35%
KOSPI	2946.66	2894.62	1.80%
JAKARTA	7117.59	7166.06	-0.68%
TAIWAN	22049.90	22072.95	-0.10%
KLSE COMPOSITE	1519.99	1518.11	0.12%
ALL ORDINARIES	8775.00	8770.60	0.05%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	91120.68	104981.80
NSE F&O	151445.48	161775.91

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2539.42

(Source: [NSE](#))

## Corporate News

- Tata Consultancy Services** has entered a long-term, strategic partnership with Salling Group to drive sustainability, technology innovations and improve organizational efficiency. The collaboration will cover Salling Group's 2,100 stores, brands and 68,000 employees across Denmark, Poland, Germany, Estonia, Lithuania and Latvia including BR, a nationwide toy store chain, franchise quick-service restaurants Carl's Jr. and Starbucks, and grocers fætex, Bilka, Netto and RIMI Baltic.
- Sun Pharma** said that USFDA conducted inspection at its Halol facility. The inspection was carried on between June 2 to June 13. The inspection concluded with a Form 483 carrying eight observations. The stated site is already under an import alert after receiving a warning letter in 2022. It is one the largest facilities of Sun Pharma.
- NTPC Group** is actively developing pumped storage projects (PSP) with a total capacity of 20 GW across India, aiming to commission 3-5 GW by fiscal year 2031-32. THDC India, an NTPC subsidiary, recently commissioned the first unit of its 1,000 MW Tehri PSP. NTPC has completed preliminary feasibility reports for 18 projects, advancing energy storage solutions.
- Lupin Limited** partners with Sino Universal Pharmaceuticals. They will commercialize Tiotropium dry powder inhaler in China. This inhaler treats Chronic Obstructive Pulmonary Disease. Sino Universal will seek regulatory approvals. Lupin will manufacture the product. This collaboration expands Lupin's presence in China. It aims to improve respiratory disease treatment. The partnership focuses on providing high-quality healthcare solutions.
- Aurobindo Pharma** said that its subsidiary, Aurobindo Pharma, USA has incorporated a new wholly owned subsidiary in USA by the name of Cresedemo Pharma LLC.
- NATCO Pharma** said that the U.S. Food and Drug Administration (FDA) had conducted an inspection at the API manufacturing plant located in Mekaguda, Hyderabad, India, which was conducted from 09 to 13 of June 2025.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BEL	403.85	394.20	2.45%
SBILIFE	1797.80	1755.20	2.43%
ULTRACEMCO	11495.00	11224.00	2.41%
HDFCLIFE	770.55	752.85	2.35%
ONGC	256.79	251.51	2.10%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
TATAMOTORS	686.65	712.05	-3.57%
DRREDDY	1346.80	1362.50	-1.15%
ADANI PORTS	1400.60	1405.00	-0.31%
SUNPHARMA	1685.30	1687.80	-0.15%

(Source: [Moneycontrol](#))

- **Syngene International** said that the United States Food and Drug Administration (US FDA) conducted a good clinical practices (GCP) compliance inspection of the company's facility located at Semicon Park, Bengaluru, from 09 to 13 of June 2025.
- Sumitomo Mitsui Financial Group and **SBI Holdings** are collaborating. They will launch a wealth management service in Japan. The target is affluent individuals. They aim to manage assets worth ₹10 trillion within five years. The venture seeks profitability within three years. It targets ₹10 billion in pre-tax profits over five years.
- **ITC Limited** has completed the acquisition of Sresta Natural Bioproducts Private Limited (SNBPL). The transaction took place at an aggregate value of Rs. 400 Crore in an all-cash deal. The company has marked its strategic entry into the fast-growing organic food market.
- **Omaxe** has expanded its footprint in Punjab with the launch of its latest integrated township, New Amritsar, through its subsidiaries, with an investment of over Rs 1,000 crore.
- **HBL Engineering** announced that it had secured a contract worth Rs 132.95 crore from South Central Railway for the deployment of the indigenously developed Kavach safety system.
- Lemon Tree Hotels has announced the signing of a new property in Itanagar, Arunachal Pradesh.
- **Adani Enterprises** has announced that its wholly owned subsidiary, Agneya Systems (ANIL), has incorporated a new wholly owned subsidiary named Astraan Defence.
- **United Drilling Tools** has secured a significant order from Oil and Natural Gas Corporation for the supply of large outer diameter (OD) casing pipes with connector totaling to Rs 107.55 crore
- **Sterlite Technologies** announced the launch of new generation data centre solutions, ranging from cabling to end-to-end connectivity offerings designed to meet the demands of AI-driven data centre.
- **Dishman Carbogen Amcis** announced that its manufacturing facility at Naroda, Ahmedabad, has successfully cleared a recent inspection by the United States Food and Drug Administration (USFDA) with zero observations.

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

## Global News

- China's retail sales increased by 6.4% yoy in May 2025, accelerating from 5.1% in the previous month. Retail sales increased 0.93% in May of 2025 over the previous month.
- China's industrial production rose by 5.8% yoy in May 2025, easing from April's 6.1% growth. Monthly, industrial output rose 0.61%.
- China's fixed-asset investment increased by 3.7% year-on-year in the January-May 2025 period. On a monthly basis, fixed-asset investment edged up by 0.05%.
- China's surveyed unemployment rate inched down to 5% in May 2025, slightly below April's figure of 5.1%.
- China's house prices in 70 cities dropped 3.5% year-on-year in May 2025, easing from a 4.0% decline in the previous month. On a monthly basis, new home prices were down by 0.2% in May, following two consecutive months of flat readings.
- U.S. consumer sentiment index surged to 60.5 in June after holding at 52.2 in May.
- U.K. Rightmove House Price Index dropped by 0.3% between May and the first weeks of June. Annual growth slowed from 1.2% to 0.8%, putting average asking prices at GBP 378,240.

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

## Economic News

- Crude Oil traded at US\$ 72.32/bbl (IST 17:00).
- INR weakened to Rs. 86.05 from Rs. 85.08 against each US\$ resulting in daily change of 0.03%.
- India's wholesale inflation eased further to a 14-month low of 0.39% in May on an annual basis as against 0.85% in April. On a sequential basis, the wholesale price index-based inflation rate contracted to 0.06% from 0.19% in April.
- India's merchandise trade deficit saw a decrease in May, reaching \$21.88 billion. Exports in May 2025 were down 2.17%, at \$38.73 billion, down from \$39.59 billion in May 2024 while imports fell 1.7% YoY, at \$60.61 billion as against \$61.68 billion.
- India's domestic passenger vehicle wholesales were down 0.8% at 3,44,656 units in May this year as compared to 3,47,492 units in the same month last year. Two-wheeler dispatches from manufacturers to dealers were up 2.2% at units 16,55,927 in May as compared to 16,20,084 units the same month a year ago. Total three-wheeler sales in the domestic market were down 3.3% at 53,942 units last month as compared to 55,763 units. Total vehicle wholesales across categories were up 1.8% at 20,12,969 units as against 19,76,674 units in May last year.
- Prime Minister Modi and the President of Cyprus convened a roundtable with business leaders, emphasizing India's economic transformation and opportunities for Cypriot companies. Discussions highlighted India's growth in sectors like aviation, shipping, and digital payments. Agreements were forged to enhance financial services and cross-border

payments, fostering stronger economic ties and trilateral cooperation.

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

## Forthcoming Events

### Board Meetings as on 17/06/2025

Ballarpur Industries Limited	Financial Results
The Orissa Minerals Development Company Limited	Financial Results

(Source: NSE)

### Corporate Actions as on 17/06/2025

Hindustan Zinc Limited	Interim Dividend - Rs 10 Per Share
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(Source: NSE)

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