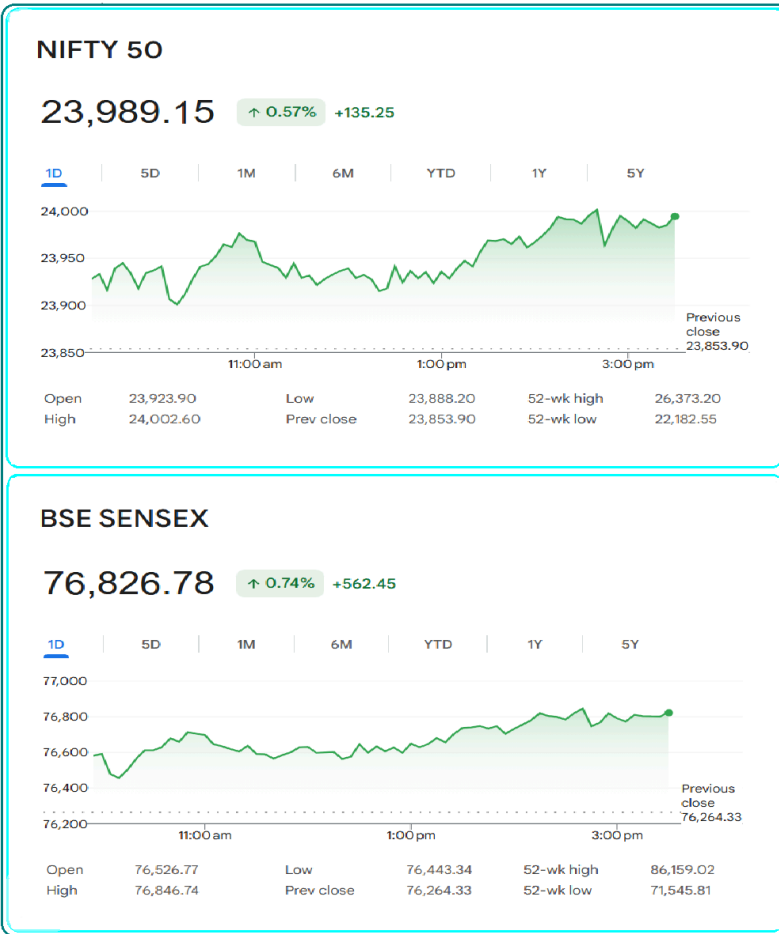


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	23989.15	23853.90	<b>0.57%</b>
<b>S&amp;P BSE SENSEX</b>	76808.48	76264.33	<b>0.71%</b>
<b>NIFTY MID100</b>	61802.05	61549.65	<b>0.41%</b>
<b>NIFTY SML100</b>	18477.75	18400.00	<b>0.42%</b>

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

## Market Wrap Up

- The key equity barometers ended with major gains, supported by a decline in crude oil prices after US and Iran reached a ceasefire agreement. Investors' sentiment boosted due to softer rupee movement. Market participants will continue to monitor monsoon progress, foreign institutional investor (FII) activity, and inflation trends for further directional cues. The Nifty touched the 24,000 mark in late trade but pared some gains before the close, ending comfortably above the 23,950 mark. The S&P BSE Sensex jumped 544.15 points or 0.71% to 76,808.48. The Nifty 50 index climbed 135.25 points or 0.57% to 23,989.15. In the three consecutive trading sessions, the Sensex and Nifty rallied 4.03 and 3.57%, respectively. The BSE 150 MidCap Index gained 0.33% and the BSE 250 SmallCap Index added 0.48%. On the BSE, 2,382 shares rose and 1,867 shares fell. A total of 180 shares were unchanged. Among the sectoral indices, the Nifty Realty index (up 2.26%), the Nifty IT index (up 1.78%) and the Nifty Media index (up 1.40%) outperformed the Nifty 50 index. Meanwhile the Nifty Metal index (down 1.55%), the Nifty Healthcare index (down 0.36%) and the Nifty Pharma index (down 0.26%) 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 **2811** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **LT, BHARTIARTL, ICICIBANK, HDFCBANK, INFY**.
- Short** position build up for the **June** series has been witnessed in **SBIN, HEROMOTOCO, BAJAJ-AUTO**.
- Unwinding** position for the **June** series has been witnessed in **RELIANCE, VEDL**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57297.15	57198.80	0.17%
NIFTY AUTO	26891.55	26977.50	-0.32%
NIFTY FMCG	49642.40	49043.40	1.22%
NIFTY IT	28568.10	28067.85	1.78%
NIFTY METAL	12881.50	13083.85	-1.55%
NIFTY PHARMA	24157.85	24220.10	-0.26%
NIFTY REALTY	818.10	800.05	2.26%
BSE CG	80121.21	79691.12	0.54%
BSE CD	60153.81	59604.49	0.92%
BSE Oil & GAS	26775.31	26550.50	0.85%
BSE POWER	8003.78	7927.27	0.97%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	69404.50	69317.50	0.13%
HANG SENG	24493.95	24842.67	-1.40%
STRAITS TIMES	5116.86	5077.29	0.78%
SHANGHAI	4091.89	4096.47	-0.11%
KOSPI	8726.60	8545.98	2.11%
JAKARTA	6254.97	6254.97	-
TAIWAN	45809.19	45396.99	0.91%
KLSE COMPOSITE	1709.99	1691.39	1.10%
ALL ORDINARIES	9131.30	9128.00	0.04%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	119619.41	138642.27
NSE F&O	140425.56	175052.12

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	749.18

(Source: [NSE](#))

## Corporate News

- Infosys** announced a strategic, long-term collaboration with Valmet, a global technology leader in serving process industries. As a part of this engagement, Infosys will modernize Valmet's core IT services and deliver end-to-end IT transformation to enhance operational efficiency and enable closer alignment between IT operations and business priorities.
- HCL Technologies** announced a strategic investment of Rs 1,427.25 crore in Bengaluru-based artificial intelligence startup Sarvam AI. HCL Tech will acquire a 10.46% stake in Sarvam AI through the purchase of 41,421 equity shares. The transaction, which is expected to be completed within two weeks, will be entirely funded through cash consideration.
- Wipro** announced the launch of its Applied AI Center of Excellence (CoE) for Claude models powered by Anthropic, reinforcing its commitment to accelerating enterprise AI impact. The CoE was inaugurated at its Bengaluru innovation hub and is a key initiative under the newly formed AI-Native Business & Platforms Unit.
- ONGC Videsh Ltd** had acquired assets overseas as part of increasing the state-run oil producer's crude output. The move to revive OVL operations in what's described as the nation with the world's biggest oil reserves comes as the Venezuelan government opens its oil sector to greater foreign participation under a new legal framework.
- Maruti Suzuki India Ltd** has launched a new prepaid after-sales maintenance plan for its customers. This 'smart maintenance plan' offers flexible service options tailored to individual driving needs. Customers can choose from various packages including labour, parts and labour, and specific services like engine oil changes.
- Nestlé India** has denied claims of infestation in Maggi noodles circulating online. The company states that tests on product samples confirm it meets all quality and safety standards. Nestlé India has submitted its findings to authorities and is cooperating with investigations. They maintain confidence in the safety and quality of their products.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1159.00	1119.30	3.55%
TATACONSUM	1130.90	1100.40	2.77%
NTPC	355.55	348.10	2.14%
BAJAJFINSV	1787.30	1750.20	2.12%
HINDUNILVR	2199.90	2156.10	2.03%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
HINDALCO	982.40	1013.90	-3.11%
JSWSTEEL	1274.30	1296.50	-1.71%
HDFCLIFE	574.40	581.20	-1.17%
APOLLOHOSP	8390.50	8468.50	-0.92%
EICHERMOT	7560.50	7624.50	-0.84%

(Source: [Moneycontrol](#))

- **Grasim Industries** announced that Phase 1 of the CPVC Resin manufacturing plant at Vilayat, Gujarat with planned capacity of approximately 50,000 metric tonnes per annum has been inaugurated today.
- **Adani Ports and Special Economic Zone** said that it has expanded its strategic partnership with Kaleris to drive next-generation capabilities across its ports and logistics network.

- **Novartis India** has launched Pluvicto, the nation's first approved radioligand therapy for eligible prostate cancer patients. This precision radiotherapy precisely targets cancer cells, offering a new treatment approach for metastatic prostate cancer.
- **NLC India Ltd** has secured a critical mineral block in Telangana.
- **Inox Wind** has signed an MoU with Inox Clean Energy (Inox Clean) to supply 1,500 MW of wind turbines.
- **Amir Chand Jagdish Kumar (Exports)** announced that Al Tasnim Group, one of the leading food distribution companies in the Sultanate of Oman, will distribute Aeroplane Rice products in the Sultanate of Oman.
- **Bondada Engineering** announced that it had received a Notification of Award (NOA) from NTPC Renewable Energy for a project valued at Rs 1,338.03 crore.
- **Welspun Living** announced that its subsidiary, Welspun USA Inc. has fully commenced commercial production at the pillow manufacturing unit at Nevada, USA with effect from 15 June 2026.
- **NBCC (India)** has secured two project management consultancy (PMC) orders with a combined value of approximately Rs 20.92 crore.

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

## Global News

- China's retail sales fell 0.6% year-on-year in May 2026, the first decline since December 2022, following a 0.2% gain in April. On a monthly basis, retail sales fell 0.4%, following a 0.6% decline in April.
- China's industrial production grew 4.5% year-on-year in May 2026, accelerating from a 4.1% rise in April. On a monthly basis, industrial output rose 0.4%.
- China's fixed-asset investment contracted by 4.1% year-on-year in the January-May 2026 period, worsening from the 1.6% drop recorded in the first four months of the year. On a monthly basis, fixed-asset investment fell by 1.91% in May, slipping further from a 2.36% drop in April.
- China's unemployment rate edged lower to 5.1% in May 2026, compared with the previous month's 5.2%. For the January-May period, the average surveyed urban unemployment rate stood at 5.2%.

- China's house prices fell 3.5% year-on-year in May 2026, matching April's pace. On a monthly basis, new home prices edged down 0.2%, after a 0.1% decrease in April.
- U.S. industrial production increased by 0.1% in May, falling short of market expectations for a 0.3% rise, following an upwardly revised 0.9% increase in April.
- U.S. manufacturing output was unchanged in May, following an upwardly revised 0.7% increase in April.
- Eurozone ZEW Indicator of Economic Sentiment climbed by 18.6 points from the prior month to 9.5 in June 2026. The current situation index fell by 2 points to -43.4.
- Germany's ZEW Indicator of Economic Sentiment rose 20.7 points to 10.5 in June 2026. The current economic situation assessment worsened slightly to -81.
- The Reserve Bank of Australia kept its cash rate unchanged at 4.35% in a unanimous decision at its June meeting.
- The Bank of Japan lifted its key short-term rate by 25bps to 1.0% in a 7-1 vote at its June meeting.

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

## Economic News

- Crude Oil traded at US\$ 78.31/bbl (IST 17:00).
- INR strengthened to Rs. 94.57 from Rs. 94.72 against each US\$ resulting in daily change of 0.16%.
- India's unemployment rate rose to 5.5% in May of 2026 from 5.2% in the previous month, the highest in nearly one year.
- India has increased the windfall tax on diesel and aviation fuel exports. The special additional excise duty on diesel exports will now be Rs 14 per litre. The levy on aviation turbine fuel exports has been raised to Rs 12.5 per litre. The tax on petrol exports remains unchanged. These revised rates will be effective from June 16, 2026.
- India recorded a current account surplus of \$4.7 billion in April 2026, compared with a deficit of \$4.8 billion a year earlier, even as net foreign portfolio investment (FPI) outflows widened to \$8.7 billion.
- Goldman Sachs has turned more optimistic on India's external position, lowering its current account deficit (CAD) forecast for 2026 to 1.3% of gross domestic product (GDP) from 2% earlier and projecting a balance of payments (BoP) surplus of 0.6% of GDP after two years of deficits.
- India's engineering exports saw a significant surge in May 2026, reaching USD 12.31 billion. This marks a 24.48% increase compared to the previous year.
- India's trade with the US saw exports remain steady in May, but imports climbed significantly. Trade with China experienced a notable surge in both exports and imports. Several other countries also showed positive export growth. However, some nations registered a decline in exports. Imports from specific countries like Brazil and Peru saw substantial increases.

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

# Forthcoming Events

## Board Meetings as on 17/06/2026

Capacit'e Infracore Limited	Fund Raising
Tata Capital Limited	Fund Raising

(Source: NSE)

## Corporate Actions as on 17/06/2026

Brigade Enterprises Limited	Bonus 1:3
Cyient Limited	Buy Back

(Source: NSE)

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