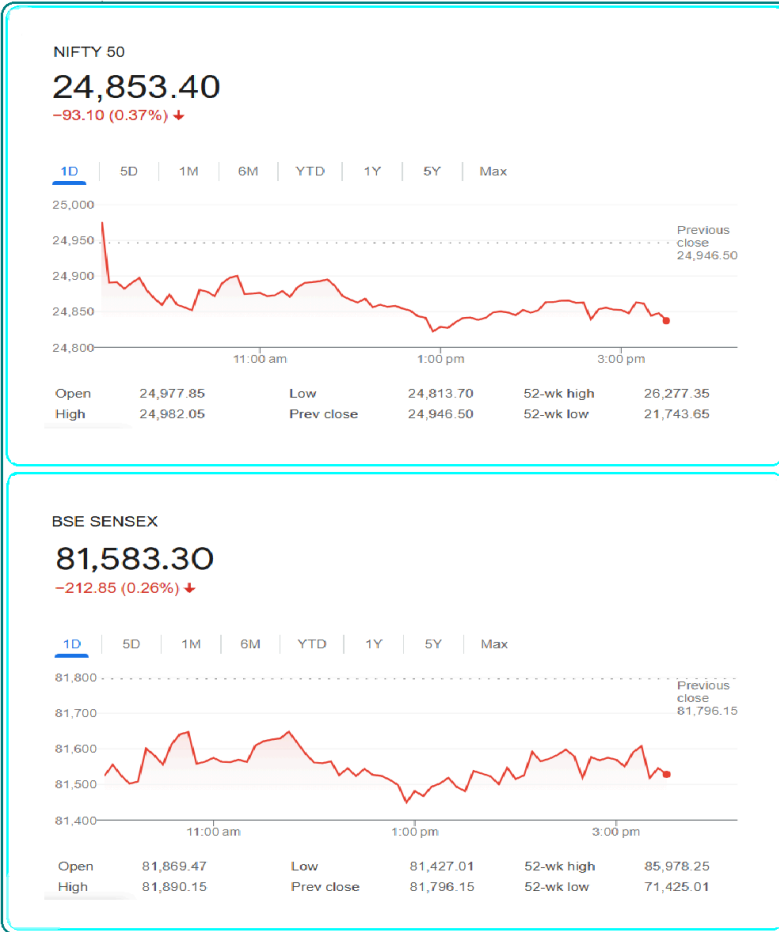


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24853.40	24946.50	-0.37%
S&P BSE SENSEX	81583.30	81796.15	-0.26%
NIFTY MID100	58379.30	58768.50	-0.66%
NIFTY SML100	18420.35	18549.20	-0.69%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55714.15	55944.90	-0.41%

Market Wrap Up

- The domestic equity benchmarks ended with modest losses today, pressured by escalating geopolitical tensions between Israel and Iran. Market sentiment remained cautious, as global uncertainties are expected to guide market direction in the near term. Investors will closely track crude oil prices, developments from the G7 summit and the outcome of the upcoming U.S. Federal Reserve meeting later this week. The Nifty settled below the 24,900 level. The S&P BSE Sensex declined 212.85 points or 0.26% to 81,583.30. The Nifty 50 index fell 93.10 points or 0.37% to 24,853.40. The S&P BSE Mid-Cap index shed 0.56% and the S&P BSE Small-Cap index fell 0.67%.
- Among the sectoral indices, the Nifty IT index (up 0.72%), the Nifty FMCG index (down 0.30%) and the Nifty Private Bank index (down 0.35%) outperformed the Nifty 50 index. Meanwhile, the Nifty Pharma index (down 1.89%), the Nifty Healthcare index (down 1.79%) and the Nifty Metal index (down 1.43%) 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 **2731** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **INFY**, **LTIM**, **TECHM**, **GODREJCP**, **GODREJPROP**, **POLICYBZR**.
- Short** position build up for the **June** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **SBIN**, **HDFCBANK**.
- Unwinding** position for the **June** series has been witnessed in **BHEL**, **ICICIBANK**, **ADANI PORTS**.

(Source: Capitaline F&O)

NIFTY AUTO	23227.30	23368.25	-0.60%
NIFTY FMCG	54708.75	54873.30	-0.30%
NIFTY IT	39356.10	39073.05	0.72%
NIFTY METAL	9224.40	9358.25	-1.43%
NIFTY PHARMA	21622.80	22039.45	-1.89%
NIFTY REALTY	1013.70	1020.30	-0.65%
BSE CG	70180.69	70336.95	-0.22%
BSE CD	57345.51	57708.17	-0.63%
BSE Oil & GAS	27240.99	27493.10	-0.92%
BSE POWER	6746.51	6764.36	-0.26%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38536.74	38311.33	0.59%
HANG SENG	23980.30	24060.99	-0.34%
STRAITS TIMES	3930.64	3908.46	0.57%
SHANGHAI	3387.40	3388.73	-0.04%
KOSPI	2950.30	2946.66	0.12%
JAKARTA	7155.85	7117.59	0.54%
TAIWAN	22211.59	22049.90	0.73%
KLSE COMPOSITE	1511.64	1519.99	-0.55%
ALL ORDINARIES	8771.10	8775.00	-0.04%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	103108.95	91120.68
NSE F&O	124860.07	151445.48

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1482.77
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Hindustan Zinc Ltd** announced an ambitious capacity expansion plan to double its zinc, lead, and silver production, investing Rs. 12,000 crore in a new 250 KTPA smelter at Debari, Rajasthan. This project, expected to complete within 36 months, aims to meet growing domestic and global demand driven by infrastructure and steel consumption.
- A consortium including **Siemens Ltd** has secured a Rs. 4,100 crore contract for India's first bullet train project, focusing on signalling and telecommunication systems. Siemens' share is Rs. 1,230 crore, involving design, installation, and long-term maintenance. The project aims to modernize railway infrastructure with ETCS Level 2 technology, supporting speeds up to 350 km/h.
- **Maruti Suzuki** introduces the 2025 Grand Vitara S-CNG. It offers a fuel-efficient and eco-friendly SUV option. The Grand Vitara S-CNG comes in Delta and Zeta variants. It features a 1.5-litre engine and delivers 26.6 km/kg mileage. The car includes six airbags, a 9-inch infotainment system, and other advanced features. Prices start at Rs. 13.48 lakh.
- **Godrej Properties** has acquired a 16-acre land parcel in Upper Kharadi, Pune, for a housing-cum-retail project. The project, with a developable potential of 2.5 million square feet, is estimated to generate a revenue of Rs 3,100 crore. This marks the company's second land acquisition in the Kharadi-Wagholi belt this month, potentially yielding a cumulative revenue of Rs 7,300 crore.
- **NBCC (India)** announced that it has secured a contract worth Rs 172.46 crore from UCO Bank for the construction of the bank's head office in Kolkata.
- **Tata Consultancy Services** has announced a strategic partnership with the Council of Europe Development Bank (CEB) to modernize the bank's operations and enhance efficiency through advanced automation.
- **Mphasis** announced that it has entered into a strategic partnership with Sixfold, an AI underwriting specialist, to integrate Sixfold's platform into insurers' systems.
- **Hyundai Motor India** has successfully commenced the production of Passenger Vehicle Engines at its Talegaon

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TECHM	1718.60	1693.90	1.46%
INFY	1639.90	1623.80	0.99%
ASIANPAINT	2264.80	2244.80	0.89%
TCS	3515.30	3496.30	0.54%
MARUTI	12595.00	12530.00	0.52%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ADANIENT	2488.50	2544.00	-2.18%
DRREDDY	1318.80	1346.80	-2.08%
SUNPHARMA	1650.20	1685.30	-2.08%
ETERNAL	247.25	252.15	-1.94%
ONGC	252.31	256.79	-1.74%

(Source: [Moneycontrol](#))

Plant. The said plant located at MIDC Talegaon Industrial Area, Pune, the facility began operations on 16 June 2025.

- **Hikal** said that it has successfully cleared the Good Manufacturing Practices (GMP) inspection conducted by the Brazilian Health Regulatory Agency (ANVISA) at its API manufacturing unit in Jigani, Bengaluru, Karnataka.
- **Vipul Organics** has received the final approval and the first commercial order for a newly developed organic intermediate intended for use in the automobile industry.
- **RateGain Travel Technologies** has joined hands with Air Montenegro to enhance the airline's pricing agility and market competitiveness across Europe.
- **AXISCADES Technologies** announced a strategic alliance with Indra, a European defense and aerospace major, to jointly manufacture and develop cutting-edge systems in India.
- **ITCONS E-Solutions** announced that it has received new work order worth Rs 62.66 lakhs from Wipro for providing technical manpower services.

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

Global News

- Eurozone ZEW Indicator of Economic Sentiment surged by 23.7 points from the prior month to 35.3 in June 2025. The current economic situation increased by 11.7 points to -30.7.
- German ZEW Indicator of Economic Sentiment surged by 22.3 points to 47.5 in June 2025. The current economic conditions index improved by 10.0 points to -72.0.
- The Bank of Japan kept its key short-term interest rate unchanged at 0.5% during its June meeting, maintaining the highest level since 2008.

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

Economic News

- Crude Oil traded at US\$ 73.11/bbl (IST 17:00).
- INR weakened to Rs. 86.24 from Rs. 85.05 against each US\$ resulting in daily change of 0.22%.
- India's unemployment rate rose to 5.6% in May 2025 from 5.1% in April. The Labour Force Participation Rate declined to 54.8% in May.
- Early monsoon rains in India dampened fuel consumption in June, causing diesel demand to decline after two months of growth. Petrol demand slowed, while jet fuel consumption increased slightly. LPG sales continued to rise, driven by Ujjwala connections, although they were lower compared to the previous month.
- India seeks assurance from the US in the finalized bilateral trade agreement (BTA) to prevent additional tariffs by the Trump administration. India requests stability in tariffs, concessions for labor-intensive sectors, and a mechanism to address potential tariff increases. Both countries aim to finalize the BTA before the deadline, with India emphasizing the need for sustained trade advantages.

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

Forthcoming Events

Board Meetings as on 18/06/2025

DJ Mediaprint & Logistics Limited	Dividend
T T Limited	Fund Raising
Vedanta Limited	Dividend

(Source: NSE)

Corporate Actions as on 18/06/2025

Capital Trust Limited	Rights 5:14 @ Premium Rs 72/-
eMudhra Limited	Dividend - Rs 1.25 Per Share
Sarla Performance Fibers Limited	Dividend - Rs 3 Per Share

(Source: NSE)

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