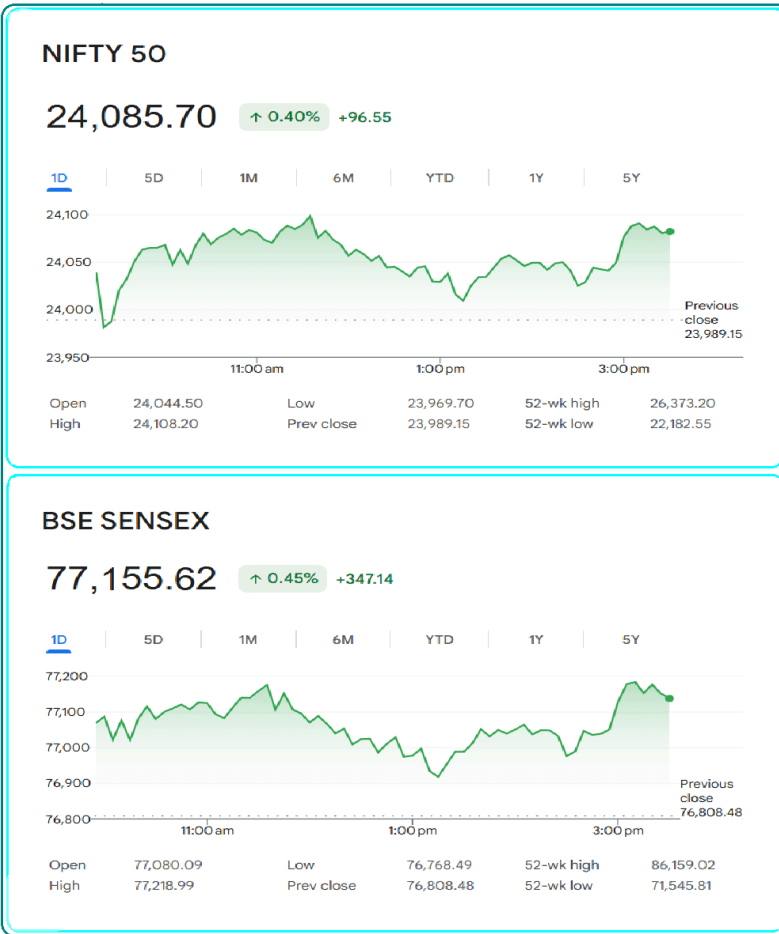


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24085.70	23989.15	0.40%
S&P BSE SENSEX	77155.62	76808.48	0.45%
NIFTY MID100	62123.35	61802.05	0.52%
NIFTY SML100	18623.20	18477.75	0.79%

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

Market Wrap Up

- The key equity barometers ended with modest gains, extending their gains for the fourth trading session. Market sentiment stayed positive following the peace agreement between the United States and Iran, which eased geopolitical concerns and supported risk appetite. However, caution prevailed due to delays in monsoon progress, which have heightened concerns over food inflation.
- The S&P BSE Sensex advanced 347.14 points or 0.45% to 77,155.62. The Nifty 50 index rose 96.55 points or 0.40% to 24,085.70. In the four straight trading sessions, the Sensex surged 4.50%, while the Nifty gained 3.99%. The BSE 150 MidCap Index gained 0.73% and the BSE 250 SmallCap Index added 0.58%. On the BSE, 2,408 shares rose and 1,871 shares fell. A total of 172 shares were unchanged.
- Among the sectoral indices, the Nifty Consumer Durables index (up 2.11%), the Nifty PSU Bank index (up 1.75%) and the Nifty Metal index (up 1.01%) outperformed the Nifty 50 index. Meanwhile, the Nifty Auto index (down 0.62%), the Nifty Realty index (down 0.43%) and the Nifty FMCG index (down 0.17%) 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 **1260** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **RELIANCE, BHARTIARTL, HDFCBANK, INFY**.
- Short** position build up for the **June** series has been witnessed in **TMPV, COLPAL, COFORGE**.
- Unwinding** position for the **June** series has been witnessed in **SBIN, ICICIBANK, BAJFINANCE, WIPRO**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57585.05	57297.15	0.50%
NIFTY AUTO	26724.40	26891.55	-0.62%
NIFTY FMCG	49556.05	49642.40	-0.17%
NIFTY IT	28809.55	28568.10	0.85%
NIFTY METAL	13011.40	12881.50	1.01%
NIFTY PHARMA	24146.55	24157.85	-0.05%
NIFTY REALTY	814.60	818.10	-0.43%
BSE CG	82328.59	80121.21	2.76%
BSE CD	60988.42	60153.81	1.39%
BSE Oil & GAS	26787.58	26775.31	0.05%
BSE POWER	8098.85	8003.78	1.19%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	69902.25	69404.50	0.72%
HANG SENG	24312.16	24493.95	-0.74%
STRAITS TIMES	5176.46	5116.86	1.16%
SHANGHAI	4108.08	4091.89	0.40%
KOSPI	8864.24	8726.60	1.58%
JAKARTA	6220.74	6254.97	-0.55%
TAIWAN	45877.39	45809.19	0.15%
KLSE COMPOSITE	CLOSED	1709.99	-
ALL ORDINARIES	9185.90	9131.30	0.60%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	133368.61	119619.41
NSE F&O	121247.21	140425.56

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	101.59
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Bharti Airtel** announced the successful completion of the first phase of a strategic initiative in partnership with 4 Corps of Indian Army headquartered at Tezpur to strengthen mobile connectivity across remote regions in Arunachal Pradesh.
- **Infosys** announced a strategic, long-term collaboration with Valmet, a global technology leader serving process industries.
- **Tata Consultancy Services** has announced a multi-year partnership with Elopak ASA, a global leader in paper-based packaging and filling equipment, operating in over 40 countries and serving customers in more than 70 markets.
- **Jaguar Land Rover** is launching a new growth plan. The company will offer more engine choices, including electric and hybrid options, for its Range Rover, Defender, and Discovery brands. Jaguar will become fully electric. This strategy aims for significant revenue growth and focuses on expanding in North America. Five new vehicles are planned for release in the next two years.
- **Glenmark Pharmaceuticals** said its subsidiary, Glenmark Pharmaceuticals Inc., USA, has launched Methylene Blue Injection USP, 50 mg/10 mL (5 mg/mL) in single-dose vial form.
- **Arfin India's** wholly owned subsidiary, Arfin Titanium & Speciality Alloys (ATSAL), signed an MoU with Japan-based Toyo Denka Kogyo Co., JFE Shoji Corporation and JFE Shoji India for a strategic business collaboration.
- **Ampere**, the E2W brand of Greaves Electric Mobility, announces launch of its latest E2W product - Reo VYB, developed to address the everyday urban mobility needs - safer, simpler, and more accessible. Designed to appeal to young urban riders and first-time EV buyers, the Reo VYB is positioned as a smart entry-level EV, available at an introductory price of Rs 69,499 under the ambit of Ampere's family scooter portfolio.
- **Great Eastern Shipping Company** (GE Shipping) took delivery of 2014 built Medium Range Tanker "Jag Prabhu" of about 49,420 dwt. The company had contracted to buy

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TRENT	3102.80	2897.80	7.07%
BEL	419.85	407.55	3.02%
HINDALCO	1007.90	982.40	2.60%
ETERNAL	258.40	253.60	1.89%
TATASTEEL	199.01	196.00	1.54%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TMPV	360.95	393.60	-8.30%
CIPLA	1350.80	1373.20	-1.63%
ONGC	245.00	248.20	-1.29%
BAJAJFINSV	1764.60	1787.30	-1.27%
AXISBANK	1350.90	1365.70	-1.08%

(Source: [Moneycontrol](#))

- **Zydus Lifesciences Ltd** has completed the USD 166.4 million acquisition of US-based pharma company Assertio Holdings Inc.
- **JioStar** is positioning itself as a technology-led entertainment company, with artificial intelligence, personalisation, commerce integration and interactive experiences expected to play an increasingly important role in content consumption, Kevin Vaz, CEO - Entertainment, JioStar, said during a fireside chat.
- **Power Grid Corporation of India** said it has emerged as the successful bidder under the tariff-based competitive bidding route for the "WR-ER Inter-Regional Network Expansion Scheme Part-A" Inter-State Transmission System (ISTS) project.
- **Procter and Gamble India** sees rising costs and softening urban demand, with company executives saying inflation will impact consumer spending. However, despite near-term challenges, P&G maintains a positive long-term outlook for India.
- **Rajesh Power Services** has received an order worth Rs 211.68 crore from Odisha Power Transmission Corporation (OPTCL) for Design, Engineering, Supply, Installation, Testing & Commissioning works for "Construction of 220kV SC line through Underground Cable from 400/220/132/33kV GSS Mendhasal to 220/132/33kV GIS GSS Chandaka-B along with 01 number of 220kV AIS bay extension at GSS Mendhasal & 01 number of 220kV GIS bay extension at Chandaka-B" on EPC contract basis.
- **Interarch Building Solutions** announced that it has secured an order worth Rs 87 crore from a customer operating in the renewable energy and solar panel industry.
- **Siyaram Recycling Industries** securing an international order worth \$426,000 from Green Metals FZCO for the supply of brass billets.

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

Global News

- U.S. housing starts fell 15.4% month-on-month in May 2026, reaching a seasonally adjusted annual rate of 1.177 million. Building permits decreased 0.7% month-over-month to a seasonally adjusted annual rate of 1.413 million in May 2026.
- U.S. export prices rose by 1.3% month-over-month in May 2026, following an upwardly revised 3.5% surge in the prior month. Import prices rose 1.9% from the previous month in May of 2026, extending the upwardly revised 2% increase from the earlier period.
- U.K. annual inflation rate in the UK stood at 2.8% in May 2026, unchanged from the previous month. On a monthly basis,

the CPI rose by 0.2% in May, easing from a 0.7% increase in April. The annual core inflation rate edged up to 2.6% in May 2026 from April's nearly five-year low of 2.5%. On a monthly basis, core consumer prices rose 0.3%, slowing from a 0.7% increase in April. The services inflation rose to 3.6% from 3.4%.

- U.K. factory gate prices advanced 4.0% year-on-year in May 2026, upwardly revised 4.1% rise in April. Monthly, factory gate prices rose 0.5%, slowing from an upwardly revised 1.5% increase in April.
- Eurozone consumer price inflation held at 3.2% in May 2026. Services inflation accelerated to 3.5% (from 3.0% in April). The core rate climbed to 2.6% from 2.2%.
- Japan's trade deficit narrowed sharply to JPY 378.7 billion in May 2026 from JPY 662.5 billion a year earlier. Exports rose 17% year-on-year to JPY 9,511.5 billion, accelerating from 14.8% in April while the imports grew 12.5% to JPY 9,890.2 billion, up from April's 9.8% gain.
- Japan's core machinery orders rose by 8.7% month-on-month to JPY 1,098.5 billion in April 2026. On an annual basis, core machinery orders grew by 15.6%, accelerating from a seven-month low of 5.9% rise in the preceding period.

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

Economic News

- Crude Oil traded at US\$ 76.41/bbl (IST 17:00).
- INR strengthened to Rs. 94.54 from Rs. 94.57 against each US\$ resulting in daily change of 0.03%.
- The government's push for non-tax revenue is off to a strong start, with public asset monetisation nearing 30% of last fiscal year's total and disinvestment income already close to its FY26 proceeds. Efforts are being ramped up to exceed the combined FY27 disinvestment and asset monetisation target of Rs. 80,000 crore.
- May witnessed a steep decline of over 81% in India's silver imports, a result of the government's recent moves to hike import duties and require licenses for incoming shipments. This strategy was prompted by unprecedented levels of silver imports in the last fiscal year, reflecting a clear intent to regulate the market.
- India and Sri Lanka are exploring ways to settle trade using their own currencies. This move aims to cut transaction costs and shield businesses from fluctuating US dollar values. The initiative will help Sri Lanka conserve its dollar reserves. Indian banks can now offer loans in rupees to Sri Lankan importers.
- Northeast India's railway infrastructure has seen a fivefold budget increase, transforming services over the past 12 years. Significant gauge conversion has unified the network, eliminating mid-journey train changes. This progress is highlighted by a record ticket-checking revenue of over Rs 2.08 crore in May 2026 for New Jalpaiguri, a first for Northeast Frontier Railway.
- The Ministry of External Affairs (MEA) on June 11 reiterated India's commitment to strengthening Afghanistan's healthcare system, announcing the gifting of medical equipment for diagnosis, treatment, and specialised care to Afghan health authorities.
- India and Canada are set to finalize a free trade agreement by the end of this year. Prime Minister Narendra Modi and his Canadian counterpart Mark Carney met to strengthen bilateral ties. Discussions focused on enhancing cooperation in

defense, trade, and energy sectors. Both nations aim to build a robust partnership through various exchanges and collaborations.

- India's steel sector is booming, with demand showing impressive growth and factories running at high capacity. Domestic steel demand grew 9% year-on-year in May 2026 and 8.7% in FY26-to-date, following 7.6% growth in FY26 after four consecutive years of double-digit expansion. It further noted "exports increased 30% YoY, on a weak base, to 0.5 million tons, but were outpaced by imports of 0.7 million tons in May 2026."

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

Forthcoming Events

Board Meetings as on 18/06/2026

State Bank of India	Fund Raising
5Paisa Capital Limited	Fund Raising
Hilton Metal Forging Limited	Fund Raising
LLOYDS ENGINEERING WORKS LIMITED	Fund Raising

(Source: NSE)

Corporate Actions as on 18/06/2026

Tata Technologies Limited	Dividend - Rs 8.35 Per Share & Special Dividend - Rs 3.35 Per Share
HDB Financial Services Limited	Dividend - Rs 2 Per Share
Vimta Labs Limited	Dividend - Rs 2 Per Share
Capital Small Finance Bank Limited	Dividend - Rs 5 Per Share
eMudhra Limited	Dividend - Rs1.25 Per Share
GHCL Limited	Dividend - Rs 12 Per Share
JSW Infrastructure Limited	Dividend - Re 0.90 Per Share

(Source: NSE)

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