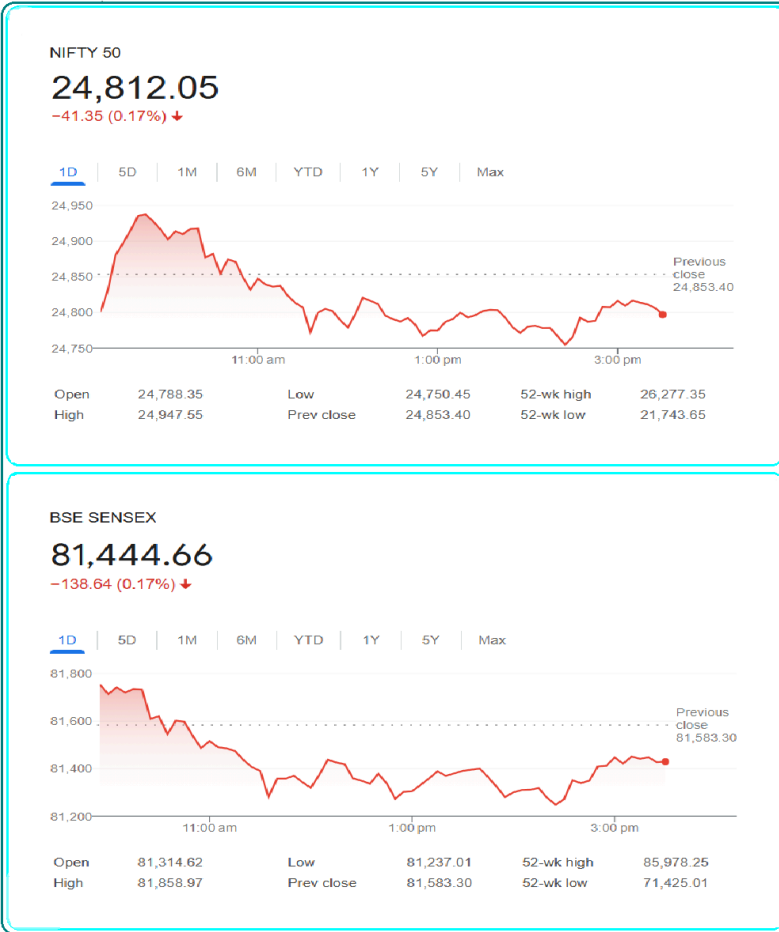


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24812.05	24853.40	-0.17%
S&P BSE SENSEX	81444.66	81583.30	-0.17%
NIFTY MID100	58109.20	58379.30	-0.46%
NIFTY SML100	18378.45	18420.35	-0.23%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55828.75	55714.15	0.21%

Market Wrap Up

- The key equity barometers ended with modest losses today, extending losses for the second consecutive trading session, driven by rising geopolitical tensions between Israel and Iran. Investors will closely monitor crude oil prices, updates from the G7 summit, and the results of the upcoming U.S. Federal Reserve meeting. The Nifty settled below the 24,850 mark. The S&P BSE Sensex declined 138.64 points or 0.17% to 81,444.66. The Nifty 50 index fell 41.35 points or 0.17% to 24,812.05. In two consecutive trading sessions, the Sensex declined 0.43%, while the Nifty shed 0.54%. The S&P BSE Mid-Cap index shed 0.34% and the S&P BSE Small-Cap index fell 0.34%.
- Among the sectoral indices, the Nifty Consumer Durables index (up 0.79%), the Nifty Private Bank index (up 0.39%), the Nifty Auto index (up 0.37%) and the Nifty Bank index (up 0.21%) outperformed the Nifty 50 index. Meanwhile, the Nifty Media index (down 1.27%), the Nifty IT index (down 0.83%) and the Nifty Metal index (down 0.72%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **June** series futures witnessed an unwinding of **short** position. Open Interest has been decreased by **3308** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **BHARTIARTL, HDFCBANK, ETERNAL**.
- Short** position build up for the **June** series has been witnessed in **RELIANCE, LT, SBIN, ICICIBANK, INFY, BAJFINANCE**.
- Unwinding** position for the **June** series has been witnessed in **GODREJPROP, DRREDDY**.

(Source: Capitaline F&O)

NIFTY AUTO	23312.35	23227.30	0.37%
NIFTY FMCG	54452.40	54708.75	-0.47%
NIFTY IT	39030.90	39356.10	-0.83%
NIFTY METAL	9158.25	9224.40	-0.72%
NIFTY PHARMA	21588.40	21622.80	-0.16%
NIFTY REALTY	1008.90	1013.70	-0.47%
BSE CG	69846.72	70180.69	-0.48%
BSE CD	57773.70	57345.51	0.75%
BSE Oil & GAS	27114.21	27240.99	-0.47%
BSE POWER	6701.20	6746.51	-0.67%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38885.15	38536.74	0.90%
HANG SENG	23710.69	23980.30	-1.12%
STRAITS TIMES	3920.81	3930.64	-0.25%
SHANGHAI	3388.81	3387.40	0.04%
KOSPI	2972.19	2950.30	0.74%
JAKARTA	7107.79	7155.85	-0.67%
TAIWAN	22356.73	22211.59	0.65%
KLSE COMPOSITE	1511.95	1511.64	0.02%
ALL ORDINARIES	8757.90	8771.10	-0.15%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	89892.68	103108.95
NSE F&O	147891.04	124860.07

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	890.93
NET SELL	-

(Source: [NSE](#))

Corporate News

- **TVS Motor Company** has entered the Indonesian electric two-wheeler market with the iQube, assembled locally at their East Karawang facility. Bookings are now open at an introductory price of IDR 29.9 million (around Rs 1.6 lakh). The iQube boasts a 115 km range, a top speed of 78 kmph, and rapid acceleration, aiming to capitalize on Indonesia's growing EV market.
- The entry of **Aditya Birla** and **Adani groups** into India's \$9 billion wires and cables sector is expected to trigger consolidation, with both giants likely to pursue acquisitions for rapid expansion. This could allow smaller players to exit, as rising competition may reduce existing firms' profit margins by up to 200 basis points.
- **Ola Electric Mobility** announced that it is rolling out a 0% commission model nationwide. Under this model, the drivers would be able to keep 100% of their fare earnings. This initiative is applicable to all categories including autos, bikes, and cabs, - with no ride or income limits.
- **Tata Power** launched affordable rooftop solar solutions in Bhubaneswar, Odisha. This launch aims to make clean energy accessible for households in the state.
- **Bharat Forge** said that it has signed a memorandum of understanding (MoU) with French aerospace company Turgis Gaillard to jointly offer the AAROK unmanned aerial vehicle (UAV) in alignment with the requirements of the Indian Ministry of Defence.
- **DCX Systems** announced that it had received multiple orders from ELTA Systems Israel, Elbit Systems Israel, Rafael Advanced Defence Systems Israel, and domestic customers, aggregating to Rs 28.59 crore.
- **Glenmark Pharmaceuticals** announced that its manufacturing facility in Monroe, North Carolina, USA, has received a Form 483 with five procedural observations from the United States Food and Drug Administration (USFDA).
- **Railtel Corporation of India** has received letter of intent (LoI) for implementation of Mizo Fibre Grid Network (MFGN) Project worth Rs 43.99 crore from Zoram Electronics Development Corporation (Zenics).

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INDUSINDBK	850.50	809.15	5.11%
TRENT	5735.00	5626.50	1.93%
TITAN	3467.80	3405.70	1.82%
MARUTI	12748.00	12595.00	1.21%
M&M	3041.10	3007.20	1.13%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TCS	3451.40	3515.30	-1.82%
ADANI PORTS	1372.60	1392.30	-1.41%
HINDUNILVR	2297.30	2328.60	-1.34%
JSWSTEEL	986.35	999.65	-1.33%
ADANI ENT	2459.10	2488.50	-1.18%

(Source: [Moneycontrol](#))

- **Alembic Pharmaceuticals** said that it has received the Establishment Inspection Report (EIR) from the US Food and Drug Administration (USFDA) for its Active Pharmaceutical Ingredient (API)-III facility in Karakhadi, Gujarat.
- The Competition Commission of India (CCI) has approved **Mahindra & Mahindra's** acquisition of a nearly 59% stake in commercial vehicle maker SML Isuzu for Rs 555 crore. Mahindra & Mahindra will acquire stakes from Sumitomo Corporation and Isuzu Motors, followed by an open offer. This acquisition aligns with Mahindra's strategy to invest in high-growth potential areas.
- **Polycab India** has executed a contract worth Rs. 6,447.54 Crore from Bharat Sanchar Nigam Limited (BSNL). Polycab shall act as the project implementation agency (PIA) for the BharatNet project in Karnataka, Goa, and Puducherry.

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

Global News

- U.S. retail sales slid by 0.9% in May after edging down by a revised 0.1% in April. Core retail sales still fell by 0.3% in May after coming in unchanged in April.
- U.S. industrial production fell 0.2% in May 2025, after increasing 0.1% in April. Manufacturing ticked up 0.1% in May.
- U.S. import prices came in flat in May after inching up by 0.1% in April. Export prices slumped by 0.9% in May after inching up by 0.1% in April.
- U.S. business inventories were flat month-over-month in April 2025, after a 0.1% increase in the prior month.
- U.K. annual inflation rate in the UK edged down to 3.4% in May 2025 from 3.5% in April. Compared to the previous month, the CPI rose 0.2%. The annual core inflation rate eased to 3.5% in May 2025 from a one-year high of 3.8% in the previous month. On a monthly basis, core consumer prices rose by 0.2%, sharply down from April's 1.4% surge.
- Eurozone consumer price inflation was confirmed at 1.9% year-on-year in May 2025, down from 2.2% in April. On a monthly basis consumer prices were flat in May 2025. The annual core inflation rate fell to 2.3% in May 2025 from 2.7% in the previous month.
- Eurozone's current account surplus narrowed significantly to EUR 19.3 billion in April 2025, down from EUR 39.1 billion a year earlier.
- Japan's trade deficit decreased significantly to JPY 637.61 billion in May 2025 from JPY 1,225.17 billion in the same month

last year. Exports declined 1.7% year-on-year to a four-month low of JPY 8,134.99 billion, swinging from a 2.0% gain in the previous month while imports fell at a faster pace of 7.7% to a three-month low of JPY 8,772.60 billion.

- Japan's core machinery orders were down a seasonally adjusted 9.1% on month in April - coming in at 919-0 billion yen. That was following the 13.0% jump in March. On a yearly basis, core machinery orders rallied 6.6% - after gaining 8.4% in the previous month.

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

Economic News

- Crude Oil traded at US\$ 75.15/bbl (IST 17:00).
- INR weakened to Rs. 86.47 from Rs. 86.24 against each US\$ resulting in daily change of 0.27%.
- Advance tax collections by the Centre rose by only 4% year-on-year to Rs 1.54 lakh crore till June 15 in FY26, indicating subdued income growth amid global uncertainties. This is a sharp slowdown from the 27% growth recorded in the same period last year, mainly due to lower personal income tax payments.
- Paddy sowing during this Kharif season has seen a 13% increase, reaching 4.53 lakh hectares compared to 4 lakh hectares last year. Pulses acreage also rose to 3.07 lakh hectares. While Shri Anna cum Coarse cereals remained stable, oilseeds witnessed growth, and sugarcane sowing saw a slight uptick.
- India's market borrowing program demonstrates stability, with net borrowings well-managed despite economic growth. The government adheres to fiscal discipline under the FRBM Act, utilizing instruments like G-secs, debt switches, and buybacks to fine-tune its borrowing profile. While public debt has increased, prudent fiscal management ensures long-term sustainability, aligning with FRBM targets.
- The government allowed the export of up to 25,000 tonnes of pharma-grade sugar per financial year under the restricted category. Only bona fide pharmaceutical exporters will be allowed to avail the opportunity.

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

Forthcoming Events

Board Meetings as on 19/06/2025

Aegis Logistics Limited	Financial Results/Dividend
Aegis Vopak Terminals Limited	Financial Results
Infibeam Avenues Limited	Fund Raising
Thirumalai Chemicals Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 19/06/2025

Tata Communications Limited	Dividend - Rs 25 Per Share
Tejas Networks Limited	Dividend - Rs 2.50 Per Share
Reliance Industrial Infrastructure Limited	Dividend - Rs 3.50 Per Share

(Source: NSE)

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