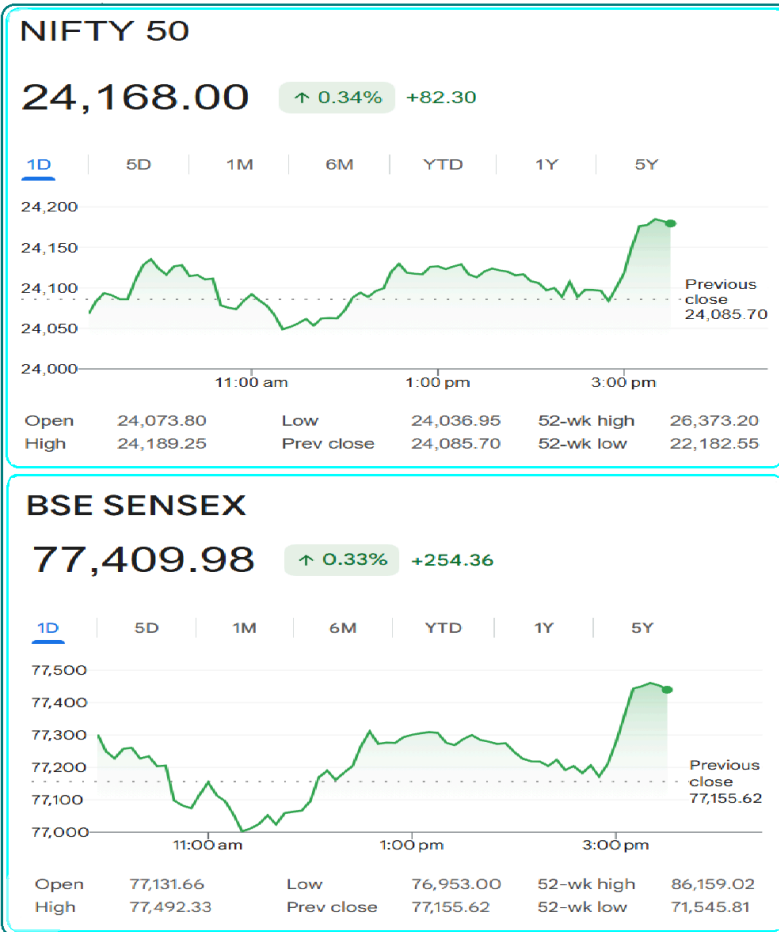


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24168.00	24085.70	0.34%
S&P BSE SENSEX	77409.98	77155.62	0.33%
NIFTY MID100	62379.25	62123.35	0.41%
NIFTY SML100	18705.60	18623.20	0.44%

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

Market Wrap Up

- The key equity barometers ended with modest gains, extending gains for the fifth consecutive trading session, supported by easing crude oil prices and improving global sentiment. Investors' confidence boosted after U.S. President Donald Trump signed a memorandum of understanding (MoU) with Iran aimed at ending the conflict, easing geopolitical concerns. Market sentiment remained resilient despite the U.S. Federal Reserve's decision to keep interest rates unchanged while signaling the possibility of a rate hike later this year. The Nifty closed above the 24,150 mark. The S&P BSE Sensex advanced 254.36 points or 0.33% to 77,409.98. The Nifty 50 index rose 82.30 points or 0.34% to 24,168. In the five consecutive trading sessions, the Sensex jumped 4.85% and Nifty climbed 4.35%. The BSE 150 MidCap Index gained 0.41% and the BSE 250 SmallCap Index added 0.67%. On the BSE, 2,425 shares rose and 1,811 shares fell. A total of 192 shares were unchanged. Among the sectoral indices, the Nifty Healthcare index (up 0.98%), the Nifty Financial Services index (up 0.67%) and the Nifty Bank index (up 0.66%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (down 1.19%), the Nifty Metal index (down 0.01%) and the Nifty Oil & Gas index (flat) 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 **728** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **SBIN, ICICIBANK, HDFCBANK**.
- Short** position build up for the **June** series has been witnessed in **RELIANCE, BHARTIARTL, INFY**.
- Unwinding** position for the **June** series has been witnessed in **BHEL, VEDL**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57963.80	57585.05	0.66%
NIFTY AUTO	26746.40	26724.40	0.08%
NIFTY FMCG	49654.50	49556.05	0.20%
NIFTY IT	28466.45	28809.55	-1.19%
NIFTY METAL	13010.40	13011.40	-0.01%
NIFTY PHARMA	24282.20	24146.55	0.56%
NIFTY REALTY	820.20	814.60	0.69%
BSE CG	82684.23	82328.59	0.43%
BSE CD	61098.61	60988.42	0.18%
BSE Oil & GAS	26802.16	26787.58	0.05%
BSE POWER	8205.43	8098.85	1.32%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	71053.49	69902.25	1.65%
HANG SENG	23924.81	24312.16	-1.59%
STRAITS TIMES	5212.84	5176.46	0.70%
SHANGHAI	4090.48	4108.08	-0.43%
KOSPI	9063.84	8864.24	2.25%
JAKARTA	6172.34	6220.74	-0.78%
TAIWAN	46465.20	45877.39	1.28%
KLSE COMPOSITE	1711.39	1709.99	0.08%
ALL ORDINARIES	9126.80	9185.90	-0.64%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	133866.06	133368.61
NSE F&O	122867.94	121247.21

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1025.20

(Source: [NSE](#))

Corporate News

- **Tata Motors** is raising prices for its commercial vehicles. The increase will be up to 2.5 percent starting July 1.
- **Unilever** is teaming up with Accenture. They will use AI-powered digital twins in factories worldwide. This initiative aims to boost efficiency and quality. Unilever plans to build over 40 new digital twins in the next 18 months.
- **JBM Auto's** unit has secured a significant Rs 750 crore long-term investment from Motilal Oswal to deploy 2,000 e-buses and bolster India's sustainable public transit. This substantial capital infusion will accelerate the rollout of zero-emission fleets across key Indian cities, marking a major step in the nation's electric mobility transition.
- **Reliance Jio** is planning to build its own low Earth orbit (LEO) satellite constellation of around 1,600-1,650 satellites at an altitude of about 650 km within the next two to three years to provide broadband and direct-to-device connectivity services.
- **Lupin** launched Azilsartan Medoxomil Tablets, 40 mg and 80 mg, in the United States following approval of its abbreviated new drug application (ANDA) by the US Food and Drug Administration (USFDA).
- **Rail Vikas Nigam** has secured a contract worth Rs 967.93 crore from East Coast Railway for the construction of major railway bridges in Odisha.
- **Waaree Renewable Technologies** announced the receipt of an enhancement in the scope of work under an existing contract from one of India's leading renewable energy companies.
- **Man Industries (India)** announced that it has bagged new orders worth Rs 1,000 crore from domestic and international customers. The company said that Man Industries (India) (MIIL) and National Pipe Company (NPC), step-down subsidiary of the company situated in Saudi Arabia have received new orders of approximately Rs 300 crore and approximately Rs 700 crore, respectively.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
MAXHEALTH	1090.45	1026.15	6.27%
INDIGO	5011.80	4878.40	2.73%
TRENT	3179.70	3102.80	2.48%
BEL	428.60	419.85	2.08%
ADANIENT	3013.40	2951.90	2.08%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	1127.50	1157.70	-2.61%
TATACONSUM	1111.40	1124.50	-1.16%
MARUTI	13484.00	13630.00	-1.07%
TECHM	1447.70	1462.40	-1.01%
TCS	2203.30	2223.00	-0.89%

(Source: [Moneycontrol](#))

- **HFCL** announced that it has secured a contract worth approximately Rs 2,666.09 crore from Rail Vikas Nigam (RVNL) for the BharatNet Phase-III project in the Uttar Pradesh (West) Telecom Circle.
- **Kirloskar Ferrous Industries** has secured an international export order valued at around \$13.51 million from a buyer based in London, United Kingdom.
- **RailTel Corporation of India** announced that it has received a Letter of Intent (LoI) worth Rs 52.56 crore from the Director (IT).

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

Global News

- The Fed kept the federal funds rate unchanged at 3.50%-3.75% for a fourth consecutive meeting in June 2026.
- U.S. retail sales increased 0.9% mom in May 2026, higher than a downwardly revised 0.4% rise in April. On a yearly basis retail sales rose by 6.9% in May 2026, acceleration from the 4.8% increase in April. Core retail sales rose by 0.8% month-over-month in May 2026, following a 0.7% increase in April. On a yearly basis, core retail sales grew by 7.5%, after a 6.4% rise in the previous month.
- U.S. pending home sales surged 3.8% month-over-month in May 2026, following a downwardly revised 0.3% rise in April.
- U.S. business inventories increased 0.5% month-over-month in April 2026, following an upwardly revised 1% rise in March.
- The Bank of England voted 7-2 to keep Bank Rate unchanged at 3.75% in June 2026.
- U.K. unemployment rate fell to 4.9% in the three months to April 2026. The number of unemployed people declined by 105 thousand to 1.764 million. The number of people claiming unemployment benefits increased by 31.2 thousand to 1.712 million in May 2026, following a downwardly revised 8.3 thousand rise in the previous month.
- Eurozone's current account surplus fell to €14.88 billion in April 2026, down from €20.84 billion a year earlier.

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

Economic News

- Crude Oil traded at US\$ 74.87/bbl (IST 17:00).
- INR strengthened to Rs. 94.34 from Rs. 94.54 against each US\$ resulting in daily change of 0.21%.
- 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 19/06/2026

Euro India Fresh Foods Limited	Fund Raising
Gujarat Themis Biosyn Limited	Fund Raising
GVP Infotech Limited	Fund Raising
Univastu India Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 19/06/2026

HDFC Bank Limited	Dividend - Rs 13 Per Share
Polycab India Limited	Dividend - Rs 47 Per Share
Sanofi Consumer Healthcare India Limited	Dividend - Rs 75 Per Share
Tata Communications Limited	Dividend - Rs 17.50 Per Share
Tata Motors Passenger Vehicles Limited	Dividend - Rs 3 Per Share
Torrent Power Limited	Dividend - Rs 5 Per Share
AWL Agri Business Limited	Dividend - Re 1 Per Share
CORONA Remedies Limited	Dividend - Rs 10 Per Share
Deepak Builders & Engineers India Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Re 1/- Per Share
GHCL Textiles Limited	Dividend - Re 0.60 Per Share
HDFC Life Insurance Company Limited	Dividend - Rs 2.10 Per Share
India Shelter Finance Corporation Limited	Dividend - Rs 10 Per Share
Indiamart Intermesh Limited	Dividend - Rs 30 Per Share/ Special Dividend - Rs 30 Per Share
Raghav Productivity Enhancers Limited	Dividend - Re 1 Per Share

(Source: NSE)

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