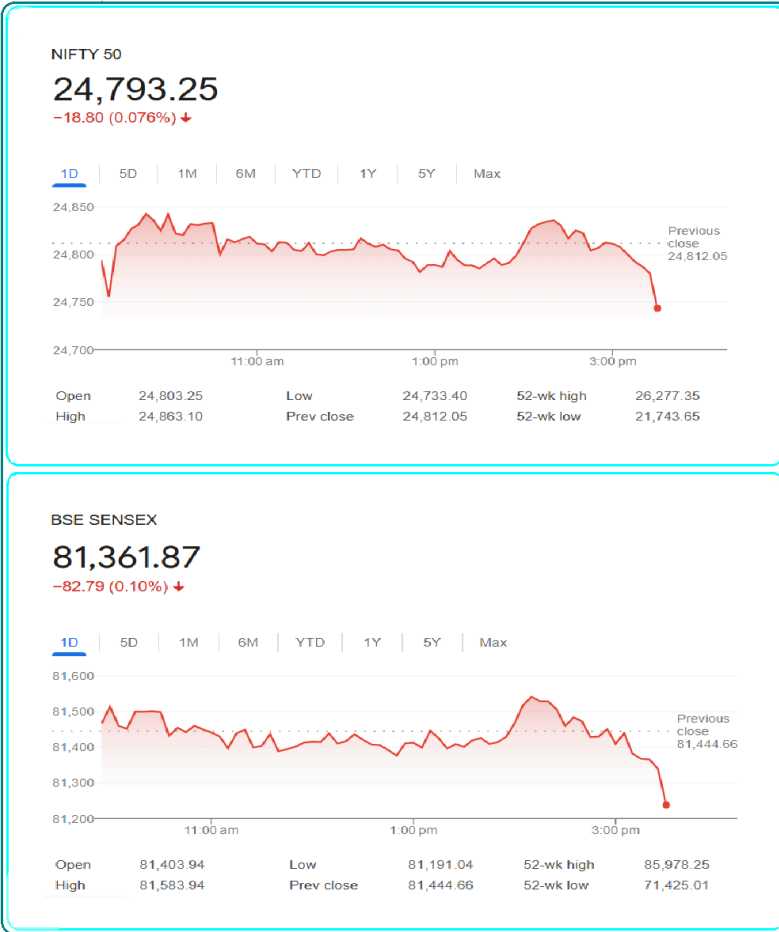


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24793.25	24812.05	-0.08%
S&P BSE SENSEX	81361.87	81444.66	-0.10%
NIFTY MID100	57159.95	58109.20	-1.63%
NIFTY SML100	18013.10	18378.45	-1.99%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55577.45	55828.75	-0.45%

Market Wrap Up

- The key equity barometers ended with minor cuts today, extending losses for the third consecutive trading session, amid rising geopolitical tensions between Israel and Iran. The US Federal Reserve's choice to keep interest rates steady also affected market sentiment. The central bank expects high inflation and slower economic growth in the near future. Market trends will probably continue to be influenced by these geopolitical issues, with investors paying close attention to crude oil prices and other global events. The Nifty settled below the 24,800 level. The S&P BSE Sensex shed 82.79 points or 0.10% to 81,361.87. The Nifty 50 index fell 18.80 points or 0.08% to 24,793.25. In the past three trading sessions, the Sensex and Nifty declined 0.53% and 0.61%, respectively. The S&P BSE Mid-Cap index declined 1.64% and the S&P BSE Small-Cap index dropped 1.77%.
- Among the sectoral indices, the Nifty Auto index (up 0.52%) outperformed the Nifty 50 index. Meanwhile, the Nifty PSU Bank index (down 2.04%), the Nifty Media index (down 1.91%) and the Nifty Realty index (down 1.60%) 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 **1416** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **MARUTI, HEROMOTOCO, JUBLFOOD**.
- Short** position build up for the **June** series has been witnessed in **HAVELLS, NBCC, OIL**.
- Unwinding** position for the **June** series has been witnessed in **RELIANCE, LT, ONGC, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.

(Source: Capitaline F&O)

NIFTY AUTO	23434.65	23312.35	0.52%
NIFTY FMCG	54283.50	54452.40	-0.31%
NIFTY IT	38664.95	39030.90	-0.94%
NIFTY METAL	9040.45	9158.25	-1.29%
NIFTY PHARMA	21441.85	21588.40	-0.68%
NIFTY REALTY	992.75	1008.90	-1.60%
BSE CG	69446.70	69846.72	-0.57%
BSE CD	57164.15	57773.70	-1.06%
BSE Oil & GAS	26890.97	27114.21	-0.82%
BSE POWER	6617.91	6701.20	-1.24%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38488.34	38885.15	-1.02%
HANG SENG	23237.74	23710.69	-1.99%
STRAITS TIMES	3894.18	3920.81	-0.68%
SHANGHAI	3362.11	3388.81	-0.79%
KOSPI	2977.74	2972.19	0.19%
JAKARTA	6968.64	7107.79	-1.96%
TAIWAN	22003.50	22356.73	-1.58%
KLSE COMPOSITE	1501.44	1511.95	-0.70%
ALL ORDINARIES	8741.40	8757.90	-0.19%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	90377.46	89892.68
NSE F&O	149673.54	147891.04

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	934.62
NET SELL	-

(Source: [NSE](#))

Corporate News

- Lodha Developers** has acquired 945 apartments in Mankhurd for Rs 567 crore to meet its slum rehabilitation commitments in Vikhroli. This significant SRA-linked asset transfer highlights the growing trend of offsite PTC fulfilment in Mumbai. The deal allows Lodha to expedite compliance and the seller to monetize free sale inventory, showcasing the increasing importance of eastern suburbs in Mumbai's redevelopment.
- Vedanta Limited**, the parent company of **Hindustan Zinc** is planning to offload shares worth Rs. 7,500 Crore via block deals. The stated transaction is to take place at up to a 10% discount on the company's last closing price.
- Abbott India** has inked a strategic distribution pact with MSD Pharmaceuticals (Merck & Co Inc in the US). With this agreement, the business plans to broaden its access to MSD's oral anti-diabetes medicines in India. Abbott will utilise its distribution infrastructure for promoting MSD's sitagliptin-based products.
- Zybus Lifesciences** announced that United States Food and Drug Administration (USFDA) has conducted a recent inspection at its oncology injectable facility in Ahmedabad. The inspection concluded with two observations. However, none of it relates to data integrity.
- Polycab India Limited** has executed a contract worth Rs. 6,447.54 Crore with Bharat Sanchar Nigam Limited (BSNL). Under the terms of agreement, BSNL will act as the project implementation agency (PIA) for the BharatNet project in Karnataka, Goa, and Puducherry.
- Jio Financial Services Limited** has picked up 7,90,80,000 equity shares of Jio Payments Bank Limited (JPBL). The company has acquired the stake from State Bank of India (SBI) for a consideration of Rs. 104.54 Crore. The deal secured approval from the Reserve Bank of India's (RBI) approval on June 4, 2025.
- Vodafone Idea** is partnering with AST SpaceMobile to offer direct-to-device satellite broadband connectivity in India, joining Reliance Jio and Bharti Airtel in the space-based services arena. This collaboration aims to expand Vi's terrestrial connectivity, providing voice, video, and data access via a satellite constellation.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TATACONSUM	1088.30	1065.20	2.17%
EICHERMOT	5493.50	5393.00	1.86%
M&M	3094.80	3041.10	1.77%
WIPRO	265.58	261.59	1.53%
APOLLOHOSP	7009.50	6933.50	1.10%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ADANIPORTS	1338.00	1372.60	-2.52%
BAJFINANCE	900.50	919.00	-2.01%
ADANIENT	2420.60	2459.10	-1.57%
TECHM	1684.00	1710.70	-1.56%
COALINDIA	384.25	390.35	-1.56%

(Source: [Moneycontrol](#))

- **Adani Power** will acquire Vidarbha Industries Power Limited. The National Company Law Tribunal approved the acquisition. Secured creditors had already approved the plan. Adani Power will pay Rs 4,000 crore to acquire the company. Vidarbha Industries owns a 600-megawatt thermal power plant in Nagpur. The resolution plan received 100% voting share. The tribunal found the plan viable for revival.
- Bajaj Markets, a part of **Bajaj Finserv** announced its integration with the Open Network for Digital Commerce (ONDC). This move will make the network accessible to its customers on Bajaj Markets App and Web.

- **Hero MotoCorp** is introducing a subscription-based battery model for its VIDA VX2 electric scooter starting July 1, aiming to lower the initial cost and broaden accessibility. This battery-as-a-service (BaaS) allows customers to subscribe to battery usage plans, separating it from the vehicle purchase.
- **Reliance Consumer Products** is set to invest up to Rs 8,000 crore to expand its beverage brands like Campa Cola, challenging Coca-Cola and PepsiCo. This investment will establish 10-12 new plants. RCPL aims for national availability by March 2027, targeting mass consumers with lower prices. Despite weather impacts, India's beverage industry is projected to reach Rs 1.47 lakh crore by 2030.
- **Welcure Drugs & Pharmaceuticals** has secured a significant mandate with Fortune Sagar Impex Company of Thailand, valued at Rs 517 crore. Under this agreement, Welcure will provide third-party sourcing and procurement services for finished-dosage SKUs.
- **Abbott** and MSD Pharmaceuticals have partnered to distribute oral anti-diabetic medicines in India. Abbott will distribute MSD's sitagliptin, its combination sitagliptin/metformin, and the extended-release version, marketed as Januvia, Janumet, and Janumet XR.
- ZOFF Foods has joined forces with **Reliance Retail**, marking an exciting entry into the booming ready-to-cook food sector. With the ready-to-cook meals market in India projected to soar to \$11.

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

Global News

- The Fed said it decided to maintain the target range for the federal funds rate at 4.25 to 4.50%.
- U.S. initial jobless claims dipped to 245,000 in the week ended June 14th, a decrease of 5,000 from the previous week's revised level of 250,000. Continuing claims edged down by 6,000 to 1.945 million in the week ended June 7th.
- U.S. housing starts plunged by 9.8% to an annual rate of 1.256 million in May after jumping by 2.7% to a revised rate of 1.392 million in April. Building permits slumped by 2.0% to an annual rate of 1.393 million in May after tumbling by 4.0% to a revised rate of 1.422 million in April.
- The Bank of England voted 6-3 to keep the Bank Rate steady at 4.25% at its June meeting.
- Australia's employment fell by 2,500 in May 2025 to 14.62 million, marking the first decline since February. The decline followed a downwardly revised 87,600 surge in April. The seasonally adjusted unemployment rate held steady at 4.1% in May 2025, unchanged from the previous two months.

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

Economic News

- Crude Oil traded at US\$ 76.28/bbl (IST 17:00).
- INR weakened to Rs. 86.73 from Rs. 86.47 against each US\$ resulting in daily change of 0.30%.
- 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.
- The government has authorized the export of up to 25,000 tonnes of pharma-grade sugar annually, under strict regulations, exclusively for legitimate pharmaceutical exporters. Furthermore, the Directorate General of Foreign Trade (DGFT) has enhanced the Trade Connect ePlatform by introducing the 'Source from India' feature, facilitating connections between international buyers and verified Indian exporters.
- The India-UK social security agreement was made a non-negotiable part of the free trade agreement (FTA) discussions two years ago. Termed the Double Contribution Convention Agreement (DCCA), it was agreed to along with the FTA between the two countries in May.
- Indian refiners have cancelled orders for 65,000 metric tons of crude palm oil due to a sudden surge in Malaysian prices. This decision, impacting deliveries from July to September, was driven by refiners seeking to secure profits amidst market volatility.

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

Forthcoming Events

Corporate Actions as on 20/06/2025

Bajaj Auto Limited	Dividend - Rs 210 Per Share
Bank of India	Dividend - Rs 4.05 Per Share
Epigral Limited	Dividend - Rs 3.50 Per Share
HDFC Life Insurance Company Limited	Dividend - Rs 2.10 Per Share
Punjab National Bank	Dividend - Rs 2.90 Per Share
Supreme Industries Limited	Dividend - Rs 24 Per Share
Tata Power Company Limited	Dividend - Rs 2.25 Per Share
Torrent Pharmaceuticals Limited	Dividend - Rs 6 Per Share
Voltas Limited	Dividend - Rs 7 Per Share

(Source: NSE)

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