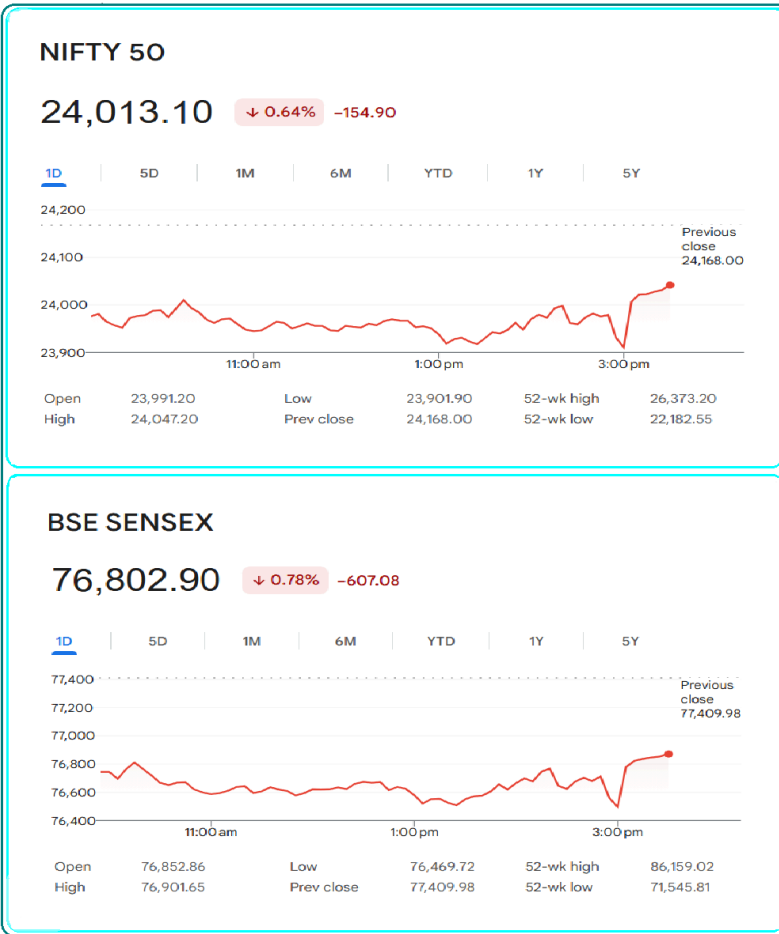


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24013.10	24168.00	-0.64%
S&P BSE SENSEX	76802.90	77409.98	-0.78%
NIFTY MID100	62517.30	62379.25	0.22%
NIFTY SML100	18784.45	18705.60	0.42%

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

Market Wrap Up

- The domestic equity benchmarks ended sharply lower, snapping their five-session winning streak, weighed down by heavy selling in index-heavyweight IT stocks. Sentiment weakened after IT major Accenture trimmed its FY26 revenue growth forecast and flagged potential revenue risks stemming from West Asia-related challenges. Further, investors remained cautious amid the U.S. Federal Reserve's policy stance, with persistent inflation concerns and expectations of interest rates staying higher for longer weighing on market sentiment.
- The S&P BSE Sensex tumbled 607.08 points or 0.78% to 76,802.90. The Nifty 50 index declined 154.90 points or 0.64% to 24,013.10. In the past five trading sessions, the Sensex jumped 4.85% and Nifty climbed 4.35%. The BSE 150 MidCap Index jumped 0.27% and the BSE 250 SmallCap Index rose 0.51%.
- Among the sectoral indices, the Nifty Healthcare index (up 0.74%), the Nifty Pharma index (up 0.73%) and the Nifty Chemical Index (up 0.12%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (down 3.65%), Nifty Oil & Gas index (down 1.18%) and the Nifty Realty Index (down 1.01%) the 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 **2570** contracts at the end of the day.
- **Long** position build up for the **June** series has been witnessed in **BHARTIARTL, ICICIBANK**.
- **Short** position build up for the **June** series has been witnessed in **RELIANCE, SBIN, HDFCBANK, INFY**.
- **Unwinding** position for the **June** series has been witnessed in **POWERINDIA, CROMPTON**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57685.75	57963.80	-0.48%
NIFTY AUTO	26583.35	26746.40	-0.61%
NIFTY FMCG	49558.70	49654.50	-0.19%
NIFTY IT	27426.85	28466.45	-3.65%
NIFTY METAL	13020.80	13010.40	0.08%
NIFTY PHARMA	24460.30	24282.20	0.73%
NIFTY REALTY	811.90	820.20	-1.01%
BSE CG	83600.96	82684.23	1.11%
BSE CD	61066.86	61098.61	-0.05%
BSE Oil & GAS	26478.50	26802.16	-1.21%
BSE POWER	8289.27	8205.43	1.02%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	71250.06	71053.49	0.28%
HANG SENG	CLOSED	23924.81	-
STRAITS TIMES	5192.70	5212.84	-0.39%
SHANGHAI	CLOSED	4090.48	-
KOSPI	9052.42	9063.84	-0.13%
JAKARTA	6177.14	6172.34	0.08%
TAIWAN	CLOSED	46465.20	-
KLSE COMPOSITE	1712.03	1711.39	0.04%
ALL ORDINARIES	9047.30	9126.80	-0.87%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	159981.95	133866.06
NSE F&O	167718.57	122867.94

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	4859.07
NET SELL	-

(Source: [NSE](#))

Corporate News

- HCL Technologies** announced a multi-year strategic partnership with e.solutions, a Germany based automotive software specialist and part of Volkswagen Group, for the development of next-generation software-defined infotainment and connectivity solutions.
- Reliance New Energy** is set to launch battery-swapping services for electric two-wheelers. This move targets the delivery and logistics sector. The company has secured necessary certifications for batteries and vehicles. Initial trials will occur within Reliance's own fleet. A wider commercial rollout is anticipated by FY27. This initiative supports Reliance's clean energy and electric mobility goals.
- Aurobindo Pharma** is set for a major US expansion. The company has received crucial antitrust clearance from the US Federal Trade Commission for its takeover of Lannett Company. This regulatory approval removes the final hurdle. The acquisition is expected to close by the end of June.
- NTPC** is installing 5 gigawatt-hours of battery storage at its coal power plants. This initiative aims to reduce renewable energy that goes unused. The investment is around 5,000 crore rupees. These battery systems will absorb excess solar and wind power. The Central Electricity Regulatory Commission has approved a tariff structure for these projects.
- NLC India Ltd** has secured a critical mineral block in Telangana. The company has been "declared as preferred bidder for critical and strategic mineral block auctions conducted by the Ministry of Mines.
- A health probe is underway into liquid discharge from **Tata's** iPhone parts factory in Hosur. Farmers report skin issues and contaminated farmland. The investigation adds to environmental concerns for Apple's manufacturing expansion in India. Water samples tested positive for E. coli. Tata states its analysis shows no contamination. The situation highlights a clash between industrial growth and local farming communities.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ETERNAL	264.30	258.55	2.22%
BHARTIARTL	1910.80	1874.80	1.92%
POWERGRID	292.25	288.70	1.23%
NTPC	365.80	361.95	1.06%
NESTLEIND	1414.80	1400.40	1.03%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	1051.40	1127.50	-6.75%
TCS	2125.00	2203.30	-3.55%
TECHM	1409.60	1447.70	-2.63%
HCLTECH	1131.70	1161.80	-2.59%
HDFCBANK	779.80	799.00	-2.40%

(Source: [Moneycontrol](#))

- Alembic Pharmaceuticals** announced that it has received tentative approval from the US Food & Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) Binimetinib Tablets, 45 mg. Alembic had previously received tentative approval for Binimetinib Tablets, 15mg.
- Bharat Forge** announced that its defence subsidiary, Kalyani Strategic Systems, has signed a strategic partnership with AM General, a leading military vehicle mobile defense capabilities solutions provider, at the Eurosatory defence exposition.
- The board of **DCM Shriram** at its meeting held on 19 June 2026 has approved equity investment of up to Rs 18 crore in one or more tranches (taking the total investment to Rs 105 crore) for obtaining additional 10 MW renewable power supply (taking total renewable power supply to 58 MW) thereby increasing Bharuch Plant's total Renewable Power supply to ~ 108 MW.
- Hindalco Industries** has commissioned an aluminium bicycle component manufacturing facility at Chakan, Pune, Maharashtra. The facility will manufacture aluminium bicycle components, including frames, rigid forks, handlebars and wheel rims, for supply to domestic and international customers.
- Mahindra Lifespace Developers** said YKK India, the Indian subsidiary of Japan's YKK Corporation, will invest \$150 million to establish a new manufacturing facility at Origins by Mahindra, Chennai.
- Tata Power Company** said that it has received a letter of intent (LoI) from REC Power Development and Consultancy for the acquisition of Ryapte Power Transmission, a project special purpose vehicle (SPV).
- Jubilant Pharmova** announced completion of USFDA inspection at its contract manufacturing facility operated by Jubilant HollisterStier LLC in Spokane, Washington, USA, conducted on 17 June 2026.
- Amber Group** has entered into a manufacturing collaboration with Oppo Mobiles India (Oppo India). OPPO India is a licensed manufacturer of Mobile Phones for brands of OPPO, OnePlus and Realme (the Brands) in India.
- VA Tech WABAG** secured a 'mega' Design, Build, Operate (DBO) contract from the Ministry of Electricity, Water & Renewable Energy (MEWRE), Kuwait, for the Doha SWRO Desalination Plant-Stage II.
- KPI Green Energy** has incorporated a wholly owned subsidiary in the name of KPCG One on 18 June 2026.

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

Global News

- U.S. initial jobless claims dipped to 226,000 in the week ended June 13th, a decrease of 4,000 from the previous week's revised level of 230,000. Continuing claims, which are seen as a gauge of outstanding unemployment in the US, rose by 24,000 from to 1,810,000 in the first week of June.
- U.S. Conference Board said its leading economic index inched up by 0.1% in May after rising by 0.2% in April.
- U.K. retail sales volumes rose 1.2% month-on-month in May 2026, rebounding from a downwardly revised 1.0% decline in April. On a yearly basis, retail trade advanced 3.2%, picking up from 0.1% in April. The core sales were up 1.2% in May from April, and rose 4.6% in annual terms.
- U.K. GfK Consumer Confidence Index held steady at -23 in June 2026.
- Germany's producer prices increased 2.2% year-on-year in May 2026, after a 1.7% rise in April. On a monthly basis, producer prices rose 0.3%, slowing sharply from a 1.2% gain in April and falling short of expectations for a 0.7% increase, marking the third straight month of growth. source: Federal Statistical Office
- Japan's annual inflation rate edged higher to 1.5% in May 2026 from 1.4% in the previous month. Core inflation stood at 1.4%, unchanged from April. On a monthly basis, consumer prices rose 0.4%, up from 0.1% in April.

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

Economic News

- Crude Oil traded at US\$ 76.92/bbl (IST 17:00).
- INR flattened to Rs. 94.34 from Rs. 94.34 against each US\$ resulting in daily change of 0.00%.
- India's direct tax collections have seen a significant jump. Net collections reached Rs 5.21 lakh crore by June 17, marking a 14.64% increase. Net corporate tax collection rose 22.47% to Rs 2.08 lakh crore, while taxes from non-corporates, including individuals, HUFs, firms and other entities, increased 8.40% to Rs 2.94 lakh crore.
- Employees' Provident Fund interest rate for 2025-26 is set at 8.25%. This rate remains unchanged for the third year. Over 70 million EPF members will see the interest credited by month-end. EPFO is also introducing UPI-based withdrawals for faster access to funds.
- India's thermal coal imports have reached a four-year low. This decline is attributed to higher domestic coal output and a significant rise in renewable energy generation. The country is actively reducing its dependence on imported coal for power. Increased local production and growing green energy sources are reshaping India's energy landscape.
- India is creating new sustainability certification standards for its export products. This initiative aims to boost the competitiveness of Indian goods in international markets. Developed nations are increasingly demanding proof of sustainability. The commerce and industry ministry is gathering information from various export sectors. This move will

help Indian businesses meet global regulations and strengthen trade ties.

- The government will decide on extending import duty exemptions for 40 products after June 30. This decision hinges on the evolving situation in West Asia and its impact on cargo movement. Revenue implications for the government are also a key consideration. The current exemption was put in place to support domestic industries facing supply chain disruptions.
- India is in talks with the World Bank and Asian Development Bank for substantial funding. This financial support aims to boost urban infrastructure and create jobs. The loans will help New Delhi manage its budget after increased spending on subsidies. The government plans to upgrade infrastructure and urban renewal projects.

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

Forthcoming Events

Board Meetings as on 20/06/2026

Utkarsh Small Finance Bank Limited	Fund Raising
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(Source: NSE)

Corporate Actions as on 22/06/2026

Panasonic Carbon India Company Ltd	Final Dividend - Rs 12 Per Share
Sangam (India) Limited	Dividend - Rs 2 Per Share

(Source: NSE)

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