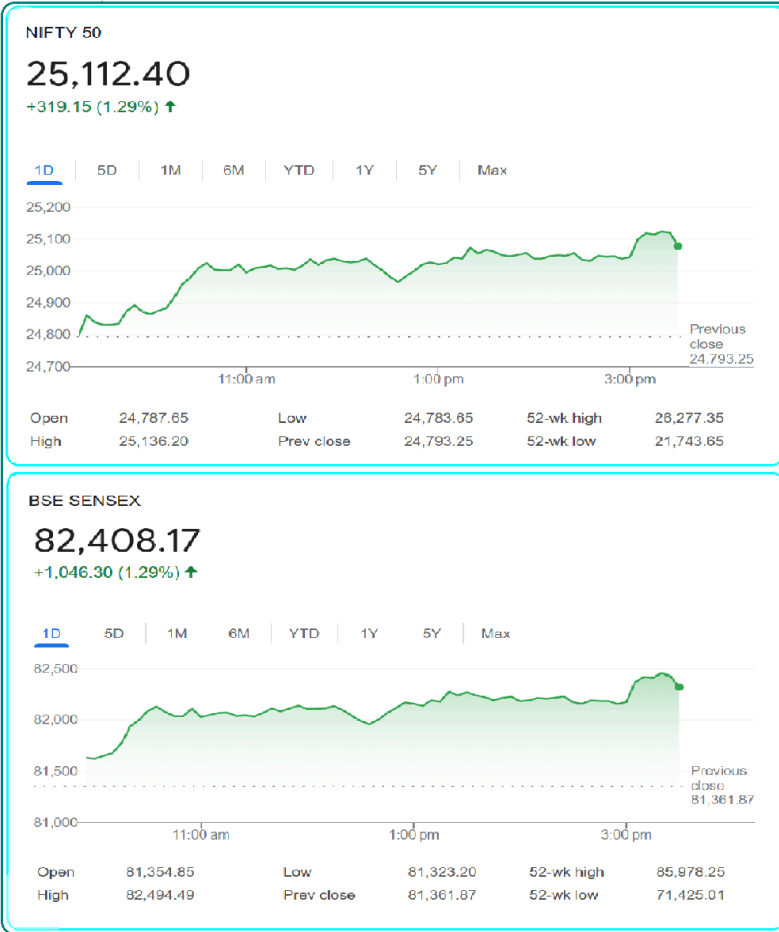


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25112.40	24793.25	1.29%
S&P BSE SENSEX	82408.17	81361.87	1.29%
NIFTY MID100	57995.50	57159.95	1.46%
NIFTY SML100	18194.20	18013.10	1.01%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56252.85	55577.45	1.22%

Market Wrap Up

- The key equity barometers ended with major gains today, snapping a three-day losing streak in a row, as the market remained steady despite increasing geopolitical tensions between Israel and Iran. Market sentiment is likely to stay responsive to global signals, including crude oil prices, bond markets, and other international events. The Nifty settled above the 25,100 level.
- The S&P BSE Sensex jumped 1,046.30 points or 1.29% to 82,408.17. The Nifty 50 index jumped 319.15 points or 1.29% to 25,112.40.
- The S&P BSE Mid-Cap index rose 1.20% and the S&P BSE Small-Cap index added 0.55%.
- Among the sectoral indices, the Nifty Realty index (up 2.11%) and the Nifty PSU Bank index (up 1.64%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (up 0.35%), the Nifty FMCG index (up 0.64%) and the Nifty Consumer Durables index (up 0.73%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **June** series futures witnessed a fresh **long** position build up. Open Interest has been decreased by **5819** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **RELIANCE, BHARTIARTL, HDFCBANK**.
- Short** position build up for the **June** series has been witnessed in **ONGC, INFY**.
- Unwinding** position for the **June** series has been witnessed in **LT, SBIN, ICICIBANK**.

(Source: Capitaline F&O)

NIFTY AUTO	23679.35	23434.65	1.04%
NIFTY FMCG	54630.95	54283.50	0.64%
NIFTY IT	38991.45	38664.95	0.84%
NIFTY METAL	9138.60	9040.45	1.09%
NIFTY PHARMA	21613.00	21441.85	0.80%
NIFTY REALTY	1013.65	992.75	2.11%
BSE CG	69259.02	69446.70	-0.27%
BSE CD	56943.91	57164.15	-0.39%
BSE Oil & GAS	26781.43	26890.97	-0.41%
BSE POWER	6603.14	6617.91	-0.22%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38403.23	38488.34	-0.22%
HANG SENG	23530.48	23237.74	1.26%
STRAITS TIMES	3883.43	3894.18	-0.28%
SHANGHAI	3359.90	3362.11	-0.07%
KOSPI	3021.84	2977.74	1.48%
JAKARTA	6907.14	6968.64	-0.88%
TAIWAN	22045.74	22003.50	0.19%
KLSE COMPOSITE	1502.74	1501.44	0.09%
ALL ORDINARIES	8723.50	8741.40	-0.20%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	159097.27	90377.46
NSE F&O	227478.23	149673.54

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	7940.70
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Reliance Retail** and the home-grown consumer appliances major **Havells India** would compete with several bulge-bracket buyout funds, to acquire a controlling interest in Whirlpool of India, the locally listed arm of the Michigan-based company that was once the world's largest appliance maker by sales.
- Diageo India (**United Spirits Limited**) said it is acquiring a majority controlling stake in Nao Spirits at an enterprise value of Rs130 crore. Three years ago, Diageo bought a 22.5% stake in Nao, which makes Hapusa and Greater Than gin and later added another 7.5% stake a year later
- **Natco Pharma** announced that its Hyderabad-based pharma division received a Form 483 with seven observations from the USFDA following an inspection conducted in June 2025. The company is confident in addressing these observations within the given timeframe. Natco Pharma remains dedicated to adhering to cGMP standards and delivering high-quality products to its global customer base.
- **Wipro Ltd** has leased eight floors, totaling 387,000 sq ft, at K Raheja Corp's Mindspace Business Park in Navi Mumbai for over 10 years. The deal, valued at Rs 328 crore including escalations, reflects a monthly rent of Rs 2.48 crore with a 5% annual increase.
- **MTAR Technologies** has entered into a 10-year long-term agreement with Weatherford Products GMBH. The company plans to execute Whipstock assemblies as part of the agreement and other crucial products.
- **Uno Minda** has nodded to the detailed project report for setting up a new manufacturing facility at Sambhajinagar, Aurangabad. The transaction value is Rs. 210 Crore. With this, the company could be able to add a capacity of 3,629 MT per annum. The company plans to achieve this capacity in a phased manner.
- **Tata Technologies Limited** said that it has been chosen as the strategic supplier by Swedish carmaker Volvo Cars. The tech business informed the bourses that as part of this partnership, it plans to focus on core areas such as product engineering, vehicle system and component engineering, embedded software, and product lifecycle

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
JIOFIN	294.25	284.10	3.57%
BHARTIARTL	1936.70	1877.00	3.18%
TRENT	5897.50	5723.50	3.04%
M&M	3184.40	3094.80	2.90%
BEL	408.25	398.55	2.43%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
BAJAJ-AUTO	8371.00	8496.00	-1.47%
HEROMOTOCO	4338.50	4384.30	-1.04%
MARUTI	12791.00	12806.00	-0.12%
DRREDDY	1325.30	1326.10	-0.06%

(Source: [Moneycontrol](#))

- **Tata Consultancy Services** said none of its "systems or users were compromised" as part of the cyberattack that led to the theft of customer data at retailer Marks and Spencer, its client of more than a decade.
- **Bharat Electronics** will be jointly developing indigenous electronics and semiconductor solutions with Tata Electronics, a company statement said on June 6, in an attempt to enhance India's chip-making ecosystem.
- **Suzlon** has secured its third successive order from AMPIN for a 170.1 MW wind project in Kurnool, Andhra Pradesh.
- **Transformers and Rectifiers (India)** has bagged an export order worth \$16.645 million from Jindal Energy Botswana.

management solutions.

- **Axiscades** has signed an agreement with European missile systems major MBDA to set up a defence facility in Karnataka. The pact has been inked through its wholly owned subsidiary Axiscades Aerospace and Technologies to set up the unit at the Aerospace Park near Kempegowda International Airport, Bengaluru, Axiscades Technologies (Axiscades).
- **Zyduz Wellness** is preparing to modernize its iconic nutritional drink brand Complan in an effort to stay relevant in a fast-evolving health food segment.
- **Hindalco Industries** announced that its wholly owned subsidiary, A.V. Minerals (Netherlands) N.V., had acquired a 100% stake in Aditya Holdings LLC, making it a step-down wholly owned subsidiary.
- **JSW Infrastructure** announced that its wholly owned subsidiary, JSW Jaigarh Port, has signed a binding MoU with Konkan Railway Corporation (KRCL) to provide a refundable, non-lapsable security deposit for developing a dedicated rail siding.
- **GMM Pfaudler** said that its wholly owned subsidiary Pfaudler Normag Systems GmbH, Germany, has received a contract for supplying acid recovery equipment & systems from a Europe-based customer.
- **TD Power Systems** secured an order worth Rs 67 crore from a leading multinational corporation for the supply of components for traction motors meant for export.
- **ITD Cementation India** announced that it has secured two major contracts cumulatively valued at approximately Rs 960 crore, excluding GST.

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

Global News

- The People's Bank of China (PBoC) kept key lending rates at record lows during the June fixing. The one-year loan prime rate (LPR)-the benchmark for most corporate and household loans-was held steady at 3.0%, while the five-year LPR, which guides mortgage rates, remained unchanged at 3.5%.
- China's foreign direct investment (FDI) declined by 13.2% year-on-year to CNY 358.19 billion (USD 49.88 billion) in the January-May 2025 period.
- U.K. retail sales dropped by 2.7% month-over-month in May 2025, following an upwardly revised 1.3% increase in April. Core retail sales declined 2.8% from the previous month. On an annual basis, sales dropped 1.3%, marking the largest annual fall since April 2024 while core sales also declined 1.3% in May, after rising 5.2% a month ago.
- U.K. GfK Consumer Confidence Index increased by 2 points to -18 in June 2025, after readings of -23 in April and -20 in May.
- German producer prices decreased by 1.2% year-on-year in May 2025, following a 0.9% drop in the previous month. On a monthly basis, the PPI fell by 0.2% in May, slightly better than market forecasts of a 0.3% decrease and April's 0.6% decline.
- France's manufacturing climate indicator was down to 96 in June 2025, slightly below May's figure of 97.
- Japan's annual inflation rate edged down to 3.5% in May 2025 from 3.6% in the previous two months. The core inflation accelerated to 3.7% from 3.5% in April. Monthly, the CPI rose 0.3%, after a 0.1% gain in April.

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

Economic News

- Crude Oil traded at US\$ 75.09/bbl (IST 17:00).
- INR strengthened to Rs. 86.59 from Rs. 86.73 against each US\$ resulting in daily change of 0.16%.
- China is poised to significantly increase its rapeseed meal imports from India, potentially reaching a record 500,000 metric tons in the 2025/26 marketing year. This surge follows China's imposition of a 100% tariff on Canadian rapeseed meal, making Indian supplies more competitive. Increased crushing in India, driven by Chinese demand, is also boosting rapeseed oil availability.
- The Reserve Bank of India (RBI) has introduced harmonized norms for project financing across banks and NBFCs, effective October 1, 2025. These directions address stress resolution, DCCO extensions, and exposure limits during project phases. The framework, developed after stakeholder consultation, aims to streamline income recognition and asset classification for project advances.
- The Central government's borrowing costs have decreased. This reflects strong economic fundamentals and proactive policies. Government security yields from FY21 to FY25 were lower than FY10-FY14. The spread between Indian and US

bond yields has narrowed. Indian bond yields remained stable in the second half of FY25. The government conducted its borrowing program carefully last fiscal year.

- India's FDI ranking improved to 15th globally in 2024, despite a slight dip in inflows to \$27.6 billion. The nation remains the top recipient in South Asia and a leading destination for greenfield projects, particularly in digital services, attracting \$54 billion between 2020 and 2024. Semiconductor and basic metals projects are driving manufacturing activity.
- India is set to approve a Rs. 3,500-5,000 crore scheme to incentivise domestic production of rare earth minerals and magnets, aiming to reduce reliance on Chinese imports. This decision follows concerns raised by industries like automotive and renewable energy, which heavily depend on these critical materials.
- The telecom industry saw a modest 1.7% AGR growth in Q4 FY25, signaling a slowdown in tariff hike benefits. Reliance Jio expanded its lead over Bharti Airtel in AGR, while Vodafone Idea and BSNL faced revenue declines. Increased AGR led to higher license fee and SUC collections, despite a slight dip in the internet user base.

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

Forthcoming Events

Board Meetings as on 21/06/2025

NTPC Limited	Fund Raising
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Board Meetings as on 23/06/2025

Prostarm Info Systems Limited	Financial Results
Ram Ratna Wires Limited	Financial Results

(Source: NSE)

Corporate Actions as on 23/06/2025

Hindustan Unilever Limited	Dividend - Rs 24 Per Share
Kalpataru Projects International Limited	Dividend - Rs 9 Per Share
Kansai Nerolac Paints Limited	Dividend - Rs 2.50 Per Sh/Spcl Dividend - 1.25 Per Sh
Dalmia Bharat Limited	Dividend - Rs 5 Per Share
GNA Axles Limited	Dividend - Rs 3 Per Share
Pilani Investment and Industries Corporation Limited	Dividend - Rs 15 Per Share
V-Mart Retail Limited	Bonus 3:1

(Source: NSE)

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