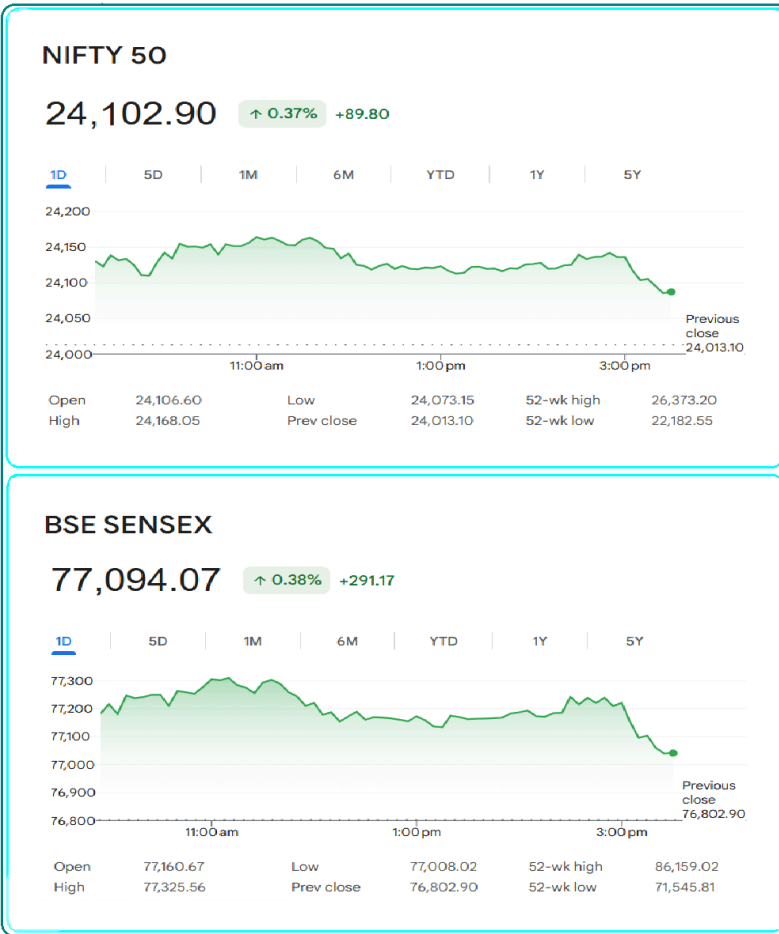


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24102.90	24013.10	0.37%
S&P BSE SENSEX	77094.07	76802.90	0.38%
NIFTY MID100	62729.10	62517.30	0.34%
NIFTY SML100	18897.00	18784.45	0.60%

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

## Market Wrap Up

- The key equity benchmarks ended with moderate gains despite lingering uncertainty over the US-Iran peace talks. The Nifty settled above the 24,100 level.
- The S&P BSE Sensex gained 291.17 points or 0.38% to 77,094.07. The Nifty 50 index jumped 89.80 points or 0.37% to 24,102.90.
- The BSE 150 MidCap Index jumped 0.43% and the BSE 250 SmallCap Index rose 0.76%. The market breadth was strong.
- Among the sectoral indices, the Nifty Pharma index (up 1.27%), the Nifty Media index (up 1.21%) and the Nifty Healthcare Index (up 1.06%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Consumer Durables index (down 0.61%), Nifty FMCG index (down 0.51%) and the Nifty Realty Index (up 0.20%) the 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 **4107** contracts at the end of the day.
- **Long** position build up for the **June** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.
- **Short** position build up for the **June** series has been witnessed in **WIPRO, SAIL**.
- **Unwinding** position for the **June** series has been witnessed in **INFY, BAJFINANCE, TMPV, COALINDIA**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57935.60	57685.75	0.43%
NIFTY AUTO	26703.45	26583.35	0.45%
NIFTY FMCG	49355.10	49558.70	-0.41%
NIFTY IT	27628.55	27426.85	0.74%
NIFTY METAL	13091.20	13020.80	0.54%
NIFTY PHARMA	24762.90	24460.30	1.24%
NIFTY REALTY	815.15	811.90	0.40%
BSE CG	84063.13	83600.96	0.55%
BSE CD	60427.98	61066.86	-1.05%
BSE Oil & GAS	26658.48	26478.50	0.68%
BSE POWER	8324.27	8289.27	0.42%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	72353.96	71250.06	1.55%
HANG SENG	23768.52	23924.81	-0.65%
STRAITS TIMES	5204.01	5192.70	0.22%
SHANGHAI	4163.10	4090.48	1.78%
KOSPI	9114.55	9052.42	0.69%
JAKARTA	6116.69	6177.14	-0.98%
TAIWAN	47741.51	46465.20	2.75%
KLSE COMPOSITE	1700.84	1712.03	-0.65%
ALL ORDINARIES	9031.20	9047.30	-0.18%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	118948.00	159981.95
NSE F&O	133570.36	167718.57

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	635.91

(Source: [NSE](#))

## Corporate News

- Tata Motors** has secured over 3,400 orders for electric commercial vehicles, signaling a significant shift in India's fleet operator adoption. These orders span across small commercial vehicles, trucks, and buses, destined for diverse sectors like e-commerce and logistics. This surge indicates a move beyond pilot projects towards large-scale integration of electric vehicles into daily commercial operations, with Tata Motors expanding its comprehensive EV solutions.
- Reliance Industries** announced that the board of Jio Platforms (JPL), its material subsidiary, has approved the Draft Red Herring Prospectus (DRHP) for a proposed initial public offering (IPO).
- Power Mech Projects** announced that it had secured a contract worth Rs 1,008.90 crore from JSW Thermal Energy.
- Rail Vikas Nigam** has secured a Rs 2,977 crore contract from NMDC for developing infrastructure facilities at Vizag, Andhra Pradesh.
- Texmaco Rail & Engineering** received a letter of intent (LoI) worth Rs 253.28 crore from JSW (South) Rail Logistics for the manufacture and supply of BFNSM1 rakes along with BVCM wagons.
- Reliance Retail** is poised for its next phase of growth with the creation of two new platforms focused on manufacturing and exports. Reliance Retail and Reliance Consumer Products (RCPL) will drive growth through an advanced manufacturing platform spanning categories such as beverages, daily essentials and fresh fruits and vegetables.
- Reliance Industries** unveiled Jio Teleframe, a platform designed for AI agents. Akash Ambani said the platform is part of the company's efforts to build AI-driven digital services and infrastructure.
- Reliance Industries** is building a sovereign AI backbone in Jamnagar, with the first phase of the project expected to be commissioned by the end of 2026.
- NOCIL** said that the government imposed anti-dumping duties on imports of Sulphenamides Accelerators from

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
CIPLA	1415.70	1351.80	4.73%
TECHM	1435.20	1409.60	1.82%
DRREDDY	1290.70	1272.10	1.46%
SUNPHARMA	1862.90	1838.30	1.34%
INFY	1065.40	1051.40	1.33%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
ASIANPAINT	2674.00	2732.90	-2.16%
TITAN	4372.50	4419.90	-1.07%
NESTLEIND	1401.90	1414.80	-0.91%
SHRIRAMFIN	992.85	1001.90	-0.90%
POWERGRID	289.75	292.25	-0.86%

(Source: [Moneycontrol](#))

- **ONGC** is shifting its focus, now prioritizing natural gas over crude oil. Chairman Arun Kumar Singh announced that gas production has surpassed oil, with future growth expected to be driven by expanding gas output.
- **Knowledge Marine & Engineering Works** said that its consortium bagged a Rs 66.11 crore contract from the Inland Waterways Authority of India (IWAI) for 10 hybrid electric passenger ferries.
- **Reliance Industries** is accelerating its push into new energy and materials businesses, with solar PV and module manufacturing lines now commissioned at Jamnagar. Reliance is developing a carbon fibre facility at Hazira, which will be the largest of its kind. In addition, the company is setting up a PVC and CPVC facility with a capacity of 1.2 million tonnes, aimed at reducing India's dependence on imports.

China, the European Union and the United States for a period of five years.

- A significant Rs 25,000 crore investment by **BHEL** and **Coal India Limited** is set to transform Odisha's coal sector. This ambitious project will explore coal gasification, moving beyond traditional power generation to unlock new opportunities in fertilizer production and boost downstream industries.
- **Garden Reach Shipbuilders & Engineers** announced that it had been granted Navratna status by the Department of Public Enterprises (DPE) under the Ministry of Finance.
- **Sun Pharma**, is set to acquire Mumbai-based Innovcare Lifesciences for approximately \$28.7 million in an all-cash deal. This strategic move aims to bolster Sun Pharma's product offerings. Innovcare, which markets pharmaceutical drugs, nutraceuticals, and cosmeceuticals, reported steady revenue growth in recent fiscal years. The transaction, expected to conclude by July 2026, is a significant step for Sun Pharma's expansion.
- **Aurobindo Pharma's** US arm has secured Federal Trade Commission approval for its \$250 million acquisition of Lannett Company. This strategic move, expected to conclude by June 2026, will bolster Aurobindo's complex generics and controlled substances portfolio, enhance its US manufacturing capabilities with Lannett's Indiana facility, and is projected to immediately boost earnings per share.
- **Jyothy Labs** is strategically expanding its Exo dishwash brand into a comprehensive franchise following Henkel's exit from Pril and Fa licensing in India. The company remains cautiously optimistic about FY27 growth, focusing on premium products, innovation, and wider distribution despite inflationary pressures. New Exo variants are showing promising consumer response, aiming to boost sales and market share.

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

## Global News

- The People's Bank of China kept its key lending rates at record lows for a 13th straight month in June 2026, the one-year loan prime rate (LPR), the benchmark for most corporate and household borrowing, was held at 3.0%, while the five-year LPR, a reference rate for mortgages, remained at 3.5%.
- Greece's current account deficit narrowed to EUR 1.39 billion in April 2026 from EUR 2.35 billion in the corresponding month a year earlier.

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

## Economic News

- Crude Oil traded at US\$ 75.75/bbl (IST 17:00).
- INR weakened to Rs. 94.69 from Rs. 94.34 against each US\$ resulting in daily change of 0.39%.
- India's foreign exchange reserves saw a dip of nearly \$10 billion to \$671.63 billion in the week ending June 12, 2026.
- India stands at the forefront of the Asian Development Bank's investment strategies as the lender aims to deploy roughly USD 1 billion in direct private sector support this year. ADB's Vice-President Bhargav Dasgupta highlighted the intention to carry forward last year's progress, particularly within renewable energy and sustainable development sectors.
- US Trade Representative Jamieson Greer and Commerce and Industry Minister Piyush Goyal will hold two-day talks this week on the first phase of the bilateral trade agreement.
- India is set to sign a free trade agreement with the European Union by December, with implementation expected by February-March next year. This pact promises near duty-free access for about 93% of Indian exports to the EU market. Discussions are also progressing with the US and Canada for similar trade deals, highlighting India's growing global trade significance.
- New draft rules from the Department of Telecommunications will allow administrative spectrum assignment for state-run firms like BSNL and MTNL, law enforcement, and private satellite/broadcasting companies. These rules specifically apply to geostationary orbit (GSO) satellite users, including VSAT and teleport operators, with spectrum fees set at 3-4% of adjusted gross revenue. Non-GSO players like Starlink are awaiting separate pricing and approval ..
- Indian banks are becoming more cautious about lending to MSMEs as early signs of stress emerge in the sector. According to a 360 ONE Capital report citing CRIF High Mark data, MSME loan growth slowed to 12.7% year-on-year in April 2026 from around 18%-20% in previous quarters, while growth in active loans decelerated sharply to 2.5%.
- Indian carmakers are set to boost their electric vehicle exports to the UK following a new trade agreement. This pact allows duty-free shipments of locally manufactured EVs under a phased quota system, starting from the sixth year.

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

## Forthcoming Events

### Board Meetings as on 23/06/2026

City Union Bank Limited	Dividend/Fund Raising
Manappuram Finance Limited	Fund Raising
Patel Integrated Logistics Limited	Buyback
Satin Creditcare Network Limited	Fund Raising

(Source: NSE)

### Corporate Actions as on 23/06/2026

Hindustan Unilever Limited	Dividend - Rs 22 Per Share
Asian Paints Limited	Dividend - Rs 23 Per Share
The Indian Hotels Company Limited	Dividend - Rs 3.25 Per Share
Tata Power Company Limited	Dividend - Rs 2.50 Per Share
Anand Rathi Share and Stock Brokers Limited	Dividend - Rs 5 Per Share
Dalmia Bharat Limited	Dividend - Rs 5 Per Share
GNA Axles Limited	Dividend - Rs 3 Per Share
Thyrocare Technologies Limited	Dividend - Rs 7 Per Share

(Source: NSE)

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