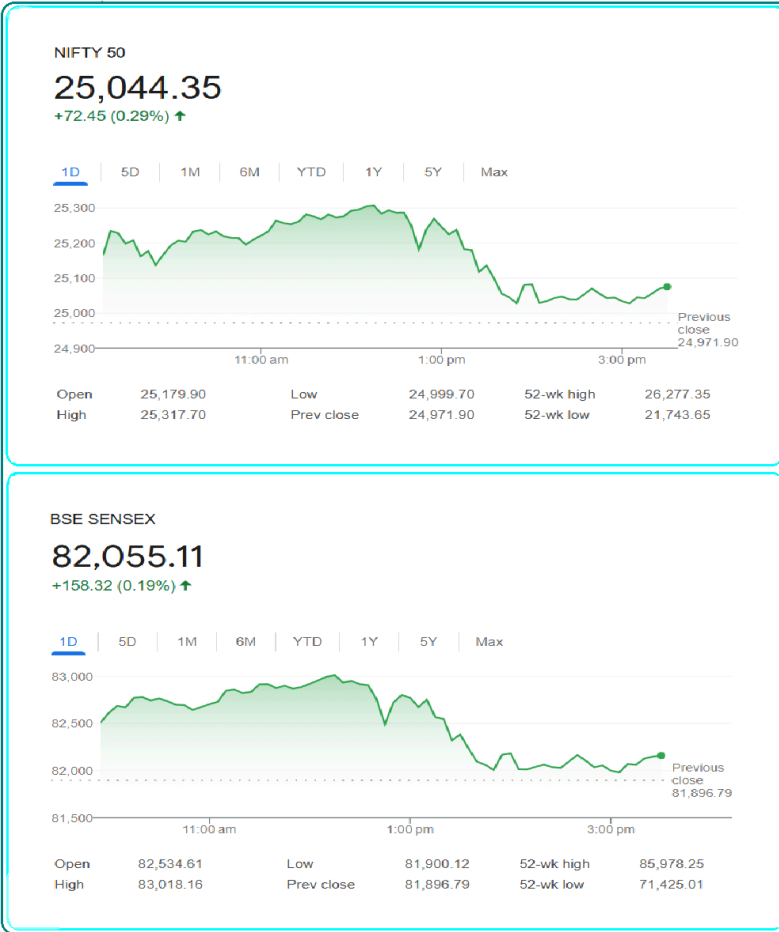


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	25044.35	24971.90	<b>0.29%</b>
<b>S&amp;P BSE SENSEX</b>	82055.11	81896.79	<b>0.19%</b>
<b>NIFTY MID100</b>	58622.40	58206.80	<b>0.71%</b>
<b>NIFTY SML100</b>	18452.75	18320.90	<b>0.72%</b>

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

## Sectoral Indices

Indices	Close	Previous	Change(%)
<b>NIFTY BANK</b>	56461.90	56059.35	<b>0.72%</b>

## Market Wrap Up

- The headline equity benchmarks ended with small gains today, supported by broad-based buying and easing geopolitical concerns, even as reports of a ceasefire violation by Iran surfaced. The Nifty settled above the 25,000 level.
- The S&P BSE Sensex added 158.32 points or 0.19% to 82,055.11. The Nifty 50 index rose 72.45 points or 0.29% to 25,044.35.
- The S&P BSE Mid-Cap index rose 0.54% and the S&P BSE Small-Cap index added 0.71%.
- Among the sectoral indices, the Nifty PSU Bank index (up 1.46%), the Nifty Metal index (up 1.01%) and the Nifty Private Bank index (up 0.73%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 1.12%), the Nifty Oil & Gas index (down 0.17%) and the Nifty IT index (up 0.01%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **July** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **34986** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **RELIANCE, LT, SBIN, HDFCBANK, ETERNAL**.
- Short** position build up for the **July** series has been witnessed in **TCS, MARUTI, VBL**.

(Source: Capitaline F&O)

NIFTY AUTO	23598.25	23461.15	0.58%
NIFTY FMCG	54346.30	54226.85	0.22%
NIFTY IT	38417.95	38414.10	0.01%
NIFTY METAL	9291.10	9198.55	1.01%
NIFTY PHARMA	21672.10	21626.20	0.21%
NIFTY REALTY	1014.25	1012.65	0.16%
BSE CG	71087.25	70903.38	0.26%
BSE CD	58102.26	57858.40	0.42%
BSE Oil & GAS	27087.81	27134.01	-0.17%
BSE POWER	6737.96	6700.87	0.55%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38790.56	38354.09	1.14%
HANG SENG	24177.07	23689.13	2.06%
STRAITS TIMES	3904.30	3879.26	0.65%
SHANGHAI	3420.57	3381.58	1.15%
KOSPI	3103.64	3014.47	2.96%
JAKARTA	6869.17	6787.14	1.21%
TAIWAN	22188.76	21732.02	2.10%
KLSE COMPOSITE	1514.29	1516.61	-0.15%
ALL ORDINARIES	8774.80	8688.00	1.00%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	111594.12	90775.26
NSE F&O	473855.85	407338.82

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	5266.01

(Source: [NSE](#))

## Corporate News

- Tata Consultancy Services** is investing over Rs 4,500 crore to expand its infrastructure across India, including new campuses and office spaces in key cities like Bengaluru, Kolkata, and Kochi. This expansion aligns with TCS's anticipated headcount growth and strong financial performance, signaling confidence in India's talent ecosystem and delivery capabilities.
- HCL Technologies** and AMD (NASDAQ: AMD), a leader in high-performance and adaptive computing, have announced a strategic alliance to accelerate enterprise digital transformation worldwide through advanced solutions in AI, digital and cloud.
- Adani Airports Holdings Ltd.** has secured USD 1 billion in project finance for Mumbai International Airport Ltd. through a mix of notes and additional funding. The deal, led by Apollo-managed funds, will refinance debt and support capital expenditure plans. This issuance marks India's first investment-grade rated private bond in the airport infrastructure sector, highlighting global investor confidence.
- The government is exploring ways to ease **Vodafone Idea's** financial burden. Options include extending the repayment period for AGR dues and changing the interest calculation method. The goal is to prevent the telecom operator from collapsing. The government is the largest shareholder and wants to protect its investment. Vi faces significant payment obligations in the coming years.
- Colgate-Palmolive (India)** plans to introduce more global brands to India, aiming to boost growth in this key market, according to MD & CEO Prabha Narasimhan. While Palmolive shows strong growth, the focus will be on leveraging Colgate-Palmolive's global portfolio to cater to Indian consumers. India's growing middle class makes it a crucial market.
- Kalpataru Limited** focused on high quality residential and commercial real estate in India's MMR (Mumbai Metropolitan Region). It was established more than 50 years ago and is headquartered in Mumbai. It has delivered more than 20m sft of developed space and has robust pipeline of to-be-delivered projects.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
JIOFIN	300.80	293.15	2.61%
ADANI PORTS	1389.50	1354.80	2.56%
SHRIRAMFIN	676.05	661.65	2.18%
GRASIM	2780.90	2723.70	2.10%
KOTAKBANK	2223.60	2184.10	1.81%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
ONGC	243.92	251.38	-2.97%
POWERGRID	285.95	290.25	-1.48%
TRENT	6057.50	6120.00	-1.02%
INDUSINDBK	831.95	839.90	-0.95%
NTPC	329.95	332.60	-0.80%

(Source: [Moneycontrol](#))

- **Tata Motors** has announced the starting prices for its all-electric SUV, the Harrier EV rear-wheel drive (RWD) models. The bookings will open on July 2, 2025. The prices for the dual-motor quad-wheel drive (QWD) versions will be revealed on June 27.
- **Glenmark Pharmaceuticals** announced that it had launched TEVIMBRA (tislelizumab) in India after receiving approval from the Central Drugs Standard Control Organization (CDSCO).
- **Gland Pharma** announced that following the Pre-approval inspection (PAI) for Sterile APIs at the Company's Facility at JNPC, Visakhapatnam between 19 February 2025, and 25 February 2025; the Company has received Establishment Inspection Report (EIR) from the US FDA indicating closure of the inspection.
- **Metro Brands** stated that it has entered into a strategic partnership with British footwear brand 'Clarks', marking the brand's re-entry into the Indian market.

- **Bajel Projects Limited** has bagged a major power transmission order from PowerGrid Corporation of India Limited (PGCIL). The order has been received through its special purpose vehicle MEL Power Transmission Limited. As per the company's filing, this order falls under the company's "Ultra-Mega" category, indicating a value of Rs. 400 Crore or above, including taxes.
- **Cochin Shipyard's** wholly owned subsidiary of the shipping company, Hooghly Cochin Shipyard (Hooghly CSL), has received a significant order worth between Rs 100 crore and Rs 250 crore from Heritage River Journeys, the operator of Antara River Cruises.
- **HG Infra Engineering** has been declared the lowest bidder for a project to develop an integrated material handling facility at the Naval Dockyard in Mumbai. The project, awarded by the Military Engineer Services (MES) in Maharashtra, is valued at Rs. 117.77 crore.
- **Garware Technical Fibres's** wholly owned UK-based subsidiary Garware Technical Fibres UK entered into a definitive share purchase agreement (SPA) to acquire Norway-based Offshore & Trawl Supply AS (OTS).
- **Lemon Tree Hotels** announced that it has signed a franchise agreement for an upcoming hotel in Kharar, Punjab, under its brand Keys Lite by Lemon Tree Hotels.
- **Enviro Infra Engineers** announced that it has bagged two key solar power projects aggregating to 69 MW (AC) capacity, marking its strategic foray into the renewables sector.
- **Mahindra Lifespace Developers** announced the launch of its redeveloped residential project Mahindra 'Codename64' in Malad (West), Mumbai.
- **Bondada Engineering** secured a Letter of Award from Tamil Nadu Green Energy Corporation (TNGECL) for a 400 MWh Battery Energy Storage Systems (BESS) project in Vellalaviduthi and Thennampatty.

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

## Global News

- U.S. existing home sales rose by 0.8% from the previous month to a seasonally adjusted annualized rate of 4.03 million in May of 2025, rebounding from the 0.5% drop in the previous month.
- U.S. S&P Global Composite PMI edged down to 52.8 in June from 53 in May. The manufacturing PMI held at 52 in June 2025, the same as in May while the services PMI inched down to 53.1 in June of 2025 from 53.7 in the previous month.
- U.K. Confederation of British Industry's (CBI) monthly net balance of new orders came in at -33 in June 2025.
- Germany's business climate index registered 88.4 in June, up from 87.5 in May. The current situation index rose only marginally to 86.2 from 86.1 in the previous month. The expectations index advanced to 90.7 from 89.0 in May.

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

## Economic News

- Crude Oil traded at US\$ 65.91/bbl (IST 17:00).
- INR strengthened to Rs. 85.97 from Rs. 86.75 against each US\$ resulting in daily change of 0.90%.
- Private equity and venture capital funding in India experienced a significant drop in May 2025, falling to USD 2.4 billion, a 68% decrease compared to May 2024. Despite this downturn, startup investments saw a 21% increase, reaching USD 1.1 billion. Financial services led sectoral investments with USD 758 billion across 21 deals.
- India and the United States are in discussions for a temporary trade agreement. Both countries are working to finalize the deal before July 9.
- Paddy sowing during this Kharif season has surged by 58 per cent, reaching 13.22 lakh hectares, according to government data released on June 20, 2025. Pulses, Shri Anna cum Coarse cereals, and cotton have also witnessed increased acreage, while oilseeds experienced a slight decrease. Overall, the total sowing area for all Kharif crops has risen to 137.84 lakh hectares.
- Escalating West Asia tensions, particularly the conflict involving Iran and Israel, could significantly impact India's economy. A USD 10 increase in crude oil prices may inflate India's oil imports by USD 13-14 billion, potentially widening the current account deficit to 1.5-1.6% of GDP.

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

# Forthcoming Events

## Board Meetings as on 25/06/2025

Can Fin Homes Limited	Fund Raising
CEAT Limited	Fund Raising
Ind-Swift Limited	Financial Results
Signatureglobal (India) Limited	Fund Raising
Valiant Organics Limited	Fund Raising

(Source: NSE)

## Corporate Actions as on 25/06/2025

Vertoz Limited	Consolidation Of Equity Shares From Re 1 Per Share To Rs 10 Per Share
----------------	---

(Source: NSE)

## DISCLAIMER

This document has been prepared by Shriram Insight Share Brokers Ltd. and is meant for sole use by the recipient and not for circulation. This document is not to be reported or copied or made available to others. The information contained herein is from sources believed reliable. It should not be considered as an offer to sell or a solicitation to buy any security or as an official confirmation of any transaction. We do not represent that it is accurate or complete and it should not be relied upon as such. This document is prepared for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The investments discussed or recommended in this report may not be suitable for all investors. Shriram Insight Share Brokers Ltd. Stock Recommendation Service is a general recommendation service and is not to be construed as an individual investor-specific Portfolio Management and Advisory Service.

The user assumes the entire risk of any use made of this information. Each recipient of this document should arrive at an independent evaluation of an investment in the securities of companies referred to in this document and should consult their own advisors to determine the merits and risks of such an investment.

Shriram Insight Share Brokers Ltd. shall not be responsible for any loss or liability incurred to the user as a consequence of his or any other person on his behalf taking any investment decisions based on the information, recommendations, research reports, analysis, quotes, etc. provided on the web site.

Shriram Insight Share Brokers Ltd shall not be liable for errors, omissions or typographical errors, disruption delay, interruption, failure, deletion or defect of/in the Service provided by it.

All Users of the Service in countries other than India understand that by using the Service, they may be violating the local laws in such countries. If the User chooses to access the Service from outside India, he shall be responsible for compliance with foreign and local laws.

**EQUITIES | DERIVATIVES | COMMODITIES | DP SERVICES | MUTUAL FUNDS | RESEARCH**

SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : [helpdesk@shriraminsight.com](mailto:helpdesk@shriraminsight.com) | [www.shriraminsight.com](http://www.shriraminsight.com) |