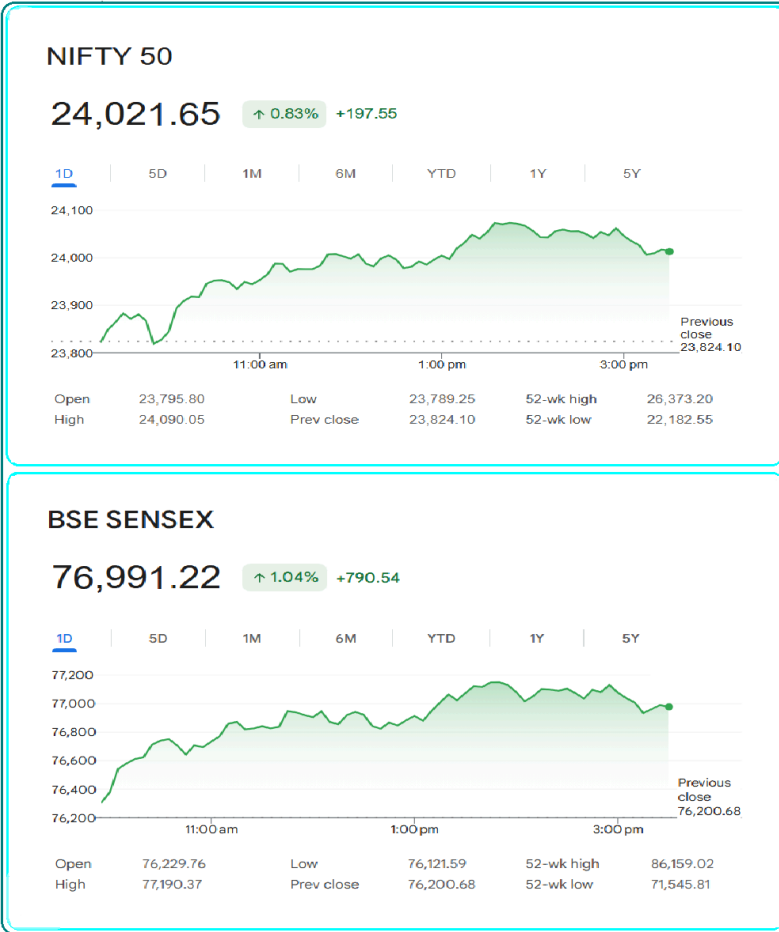


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24021.65	23824.10	0.83%
S&P BSE SENSEX	76991.22	76200.68	1.04%
NIFTY MID100	62135.25	62070.35	0.10%
NIFTY SML100	18879.30	18805.90	0.39%

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

Market Wrap Up

- The key equity benchmarks ended sharply higher, supported by easing crude oil prices, encouraging remarks from the Reserve Bank of India Governor on the interest rate trajectory and inflation outlook, and strong buying in heavyweight banking and financial stocks. Gains in frontline lenders helped offset concerns over the possibility of further U.S. rate hikes and weak monsoon rainfall. The Nifty settled above the 24,000 level.
- The S&P BSE Sensex soared 709.54 points or 1.04% to 76,991.22. The Nifty 50 index rose 197.55 points or 0.83% to 24,021.65.
- The BSE 150 MidCap Index jumped 0.13% and the BSE 250 SmallCap Index added 0.20%.
- Among the sectoral indices, the Nifty Realty index (up 2.17%), the Nifty IT index (up 2.05%) and the Nifty Private bank index (up 1.85%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Auto index (down 0.42%), Nifty Metal index (down 0.40%) and the Nifty Oil & Gas Index (up 0.63%) 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 **7265** contracts at the end of the day.
- **Long** position build up for the **June** series has been witnessed in **RELIANCE, LT, ICICIBANK, HDFCBANK**.
- **Short** position build up for the **June** series has been witnessed in **BHARTIARTL, HDFCAMC**.
- **Unwinding** position for the **June** series has been witnessed in **SBIN, INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	58150.35	57183.75	1.69%
NIFTY AUTO	26384.35	26496.50	-0.42%
NIFTY FMCG	49085.10	49059.05	0.05%
NIFTY IT	27566.70	27012.05	2.05%
NIFTY METAL	12618.75	12669.10	-0.40%
NIFTY PHARMA	25018.95	24989.95	0.12%
NIFTY REALTY	823.55	806.05	2.17%
BSE CG	81468.51	83019.17	-1.87%
BSE CD	59821.88	59602.68	0.37%
BSE Oil & GAS	26654.49	26448.44	0.78%
BSE POWER	8091.83	8228.15	-1.66%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	69174.97	69788.38	-0.88%
HANG SENG	23412.18	23336.28	0.33%
STRAITS TIMES	5215.99	5205.74	0.20%
SHANGHAI	4110.81	4106.25	0.11%
KOSPI	8471.02	8203.84	3.26%
JAKARTA	5883.88	6101.33	-3.56%
TAIWAN	46043.60	47100.65	-2.24%
KLSE COMPOSITE	1682.13	1679.92	0.13%
ALL ORDINARIES	9012.60	8988.30	0.27%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	122776.22	131784.41
NSE F&O	413862.68	221504.18

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1843.40

(Source: [NSE](#))

Corporate News

- Cummins India** anticipates robust domestic demand to fuel its fiscal 2027 growth, despite ongoing Middle East geopolitical tensions impacting exports. Managing Director Shveta Arya highlighted that while exports, representing 17% of revenue, are expected to remain subdued, strong performance in India's infrastructure sector, including data centers and marine applications, will drive double-digit revenue increases.
- Adani Group** is venturing into nuclear power, aiming for 10 GW capacity by 2035 to bolster India's energy security amidst global uncertainties. Chairman Gautam Adani announced land acquisition for Adani Atomic Energy, a significant addition to the conglomerate's integrated power platform. This move aligns with accelerated investments across the energy value chain, from mining to clean energy technologies, underscoring a commitment to reliable, affordable, and round-the-clock power for the nation.
- Tata Motors** is set to invest up to Rs 40,000 crore over five years, aiming to nearly double its passenger vehicle capacity and introduce new models. The company targets a 20% domestic market share by FY31, with electric and CNG vehicles driving significant growth. This ambitious plan includes expanding its EV lineup and enhancing battery technology to address adoption barriers, positioning Tata Motors for a multi-powertrain future.
- Japan's **Honda Motor Co.** has received a green light from the Competition Commission of India (CCI) to acquire an additional 21% stake in automotive components maker Astemo from Hitachi. This move will transform Astemo into a consolidated subsidiary of Honda. The deal, announced last December, will see Honda's ownership increase significantly, solidifying its control over the key auto parts manufacturer.
- Bajaj Auto** confirmed a ransomware attack on Tuesday, affecting its systems and those of its unit, Bajaj Auto Technology. The automotive giant swiftly implemented precautionary measures and security protocols to contain the breach. These actions have reportedly been successful in mitigating the impact of the cyber incident, ensuring operational continuity.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INDIGO	5207.20	4961.40	4.95%
ADANIENT	3069.70	2962.90	3.60%
TRENT	3247.00	3142.90	3.31%
TECHM	1461.60	1415.60	3.25%
BAJFINANCE	990.95	962.40	2.97%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
BAJAJ-AUTO	9750.00	10025.00	-2.74%
NTPC	357.05	364.60	-2.07%
ONGC	240.00	244.35	-1.78%
TATASTEEL	190.16	193.56	-1.76%
BEL	413.55	420.00	-1.54%

(Source: [Moneycontrol](#))

- **ONGC** is in talks with Venezuela's PDVSA to acquire stakes in two oilfields, San Cristobal and Carabobo. This move hinges on ONGC securing a crucial US license to operate, a requirement following US oversight of Venezuela's oil sector. The company aims for greater operational control, potentially boosting production and recovering stuck dividends. International majors have already received similar approvals.
- **Trent's** management outlined its long-term growth strategy for its fashion and value-retail businesses at the 47th annual general meeting (AGM).
- **Bharat Dynamics** has received following orders worth about Rs 1347.71 crore (gross) from Hindustan Aeronautics (HAL) - a) Helina Launchers & LRUs of Rs 1109.37 crore (gross), b) CMDS LRUs of Rs. 238.34 crore (gross).
- **Biocon** said that its long-standing partner Duopharma Biotech has secured multiple insulin contracts from the Ministry of Health (MoH), Malaysia, valued at over MYR 225 million this year.
- **Greaves Cotton** announced that it has incorporated wholly owned subsidiary, Greaves International Trading FZE (GITFZE) in Dubai, United Arab Emirates to strengthen its presence in overseas market.
- **Ola Electric Mobility's** subsidiary, Ola Cell Technologies (OCT), received Bureau of Indian Standards (BIS) certification for its indigenously developed 46100 lithium iron phosphate (LFP) battery cell.
- **Infosys** announced an expanded multi-year collaboration with GlobalFoundries to accelerate AI-driven transformation of the chipmaker's IT operations.
- **Solarium Green Energy** secured a solar EPC order worth Rs 186.53 crore for a 50 MW AC/65 MW DC solar photovoltaic (PV) power project in Maharashtra.
- **NLC India** has signed a memorandum of understanding (MoU) with Indian Oil Corporation (IOCL) for the formation of a joint venture for the establishment of renewable energy power projects in Tamil Nadu.

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

Global News

- U.S. S&P Global Composite PMI rose to 52.2 in June of 2026 from 51.5 in the previous month. The manufacturing PMI increased to 55.7 in June 2026 from 55.1 in May while the services PMI rose to 51.3 in June 2026 from 50.7 in May.
- Germany's Ifo Business Climate Index increased to 85.6 in June 2026, the highest in three months, compared to an upwardly revised 85 in May. The current conditions gauge rose to 87 from 86.1. The expectations index also improved to 84.1 from 83.9.

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

Economic News

- Crude Oil traded at US\$ 71.85/bbl (IST 17:00).
- INR strengthened to Rs. 94.67 from Rs. 94.74 against each US\$ resulting in daily change of 0.07%.
- India's economic growth is projected to slow to 6.6% in the current fiscal year, according to S&P Global Ratings. This slowdown is attributed to energy market pressures, a potentially weak monsoon, and a global economic deceleration. Higher energy and fertilizer costs are expected to fuel inflation, potentially leading to a policy rate hike in the latter half of the fiscal year.
- India has launched an anti-dumping investigation into electrical steel imports from China, Japan, Korea, and Russia. This move, prompted by a complaint from JSW JFE Electrical Steel Nashik, aims to protect domestic manufacturers from alleged cheap imports that are reportedly causing significant harm. The probe will determine if dumping has occurred and if duties are necessary to ensure fair trade.
- India and the US are pushing for an interim trade pact, with high-level talks led by Piyush Goyal and Jamieson Greer aiming for a deal before July 24. Both nations emphasize a "win-win" partnership, with India seeking lower tariffs and better market access. Discussions focused on advancing negotiations for a balanced and mutually beneficial agreement, building on a February joint statement.
- Energy cooperation is a cornerstone of the strengthening US-India relationship, with crude oil, LNG, LPG, and civil nuclear power identified as key areas. Despite differing views on some matters, the partnership's strategic logic and resilience are growing. This collaboration significantly boosts India's energy security and fosters economic growth, with both nations committed to further deepening these ties.
- India faces a significant 42% rainfall deficit this monsoon, exacerbated by El Nino. The government is implementing contingency plans across 315 vulnerable districts, focusing on water conservation and crop diversification. While sowing is slightly ahead of last year, soybean planting lags. District-specific strategies are being deployed to mitigate potential impacts on farm output and ensure food security.
- Niti Aayog proposes a blueprint for free trade agreements to boost regulatory predictability in India's pharmaceutical sector. The think tank urges a shift towards high-value segments, emphasizing enhanced industry-academia

collaboration for patent commercialization and startup incubation. While India is the 'pharmacy of the world,' it needs to move up the value chain by focusing on deeptech innovation to become a capital for pharma innovation.

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

Forthcoming Events

Board Meetings as on 25/06/2026

Ganga Forging Limited	Fund Raising
Suryoday Small Finance Bank Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 25/06/2026

Alkyl Amines Chemicals Limited	Dividend - Rs 10 Per Share
Allied Blenders and Distillers Limited	Dividend - Rs 5.40 Per Share
Anthem Biosciences Limited	Dividend - Rs 2 Per Share
CARE Ratings Limited	Dividend - Rs 14 Per Share
Dr. Lal Path Labs Ltd.	Dividend - Rs 4 Per Share
GIC Housing Finance Limited	Dividend - Rs 4.50 Per Share
IndusInd Bank Limited	Dividend - Rs 1.50 Per Share
Life Insurance Corporation Of India	Dividend - Rs 10 Per Share
Mawana Sugars Limited	Dividend - Rs 4 Per Share
Nippon Life India Asset Management Limited	Dividend - Rs 12.50 Per Share
S.J.S. Enterprises Limited	Dividend - Rs 3.50 Per Share
Sona BLW Precision Forgings Limited	Dividend - Rs 1.80 Per Share
Supreme Industries Limited	Dividend - Rs 25 Per Share
Syngene International Limited	Dividend - Rs 1.25 Per Share
UFLEX Limited	Dividend - Rs 3 Per Share
Visaka Industries Limited	Dividend - Rs 1.20 Per Share

(Source: NSE)

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