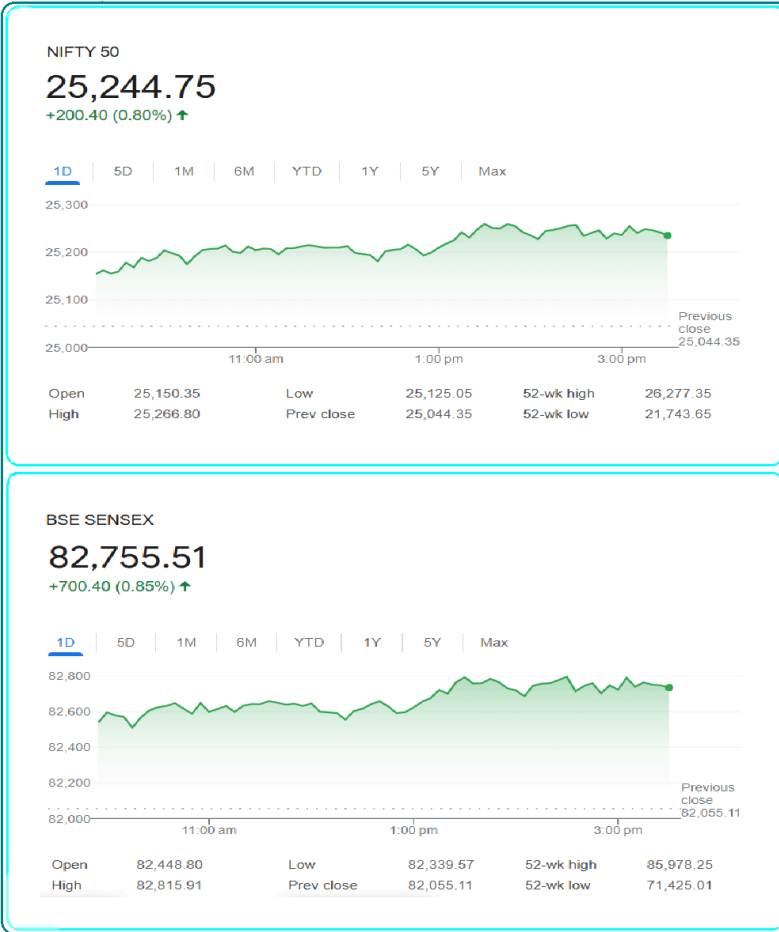


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25244.75	25044.35	0.80%
S&P BSE SENSEX	82755.51	82055.11	0.85%
NIFTY MID100	58881.70	58622.40	0.44%
NIFTY SML100	18727.85	18452.75	1.49%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56621.15	56461.90	0.28%

Market Wrap Up

- The key equity barometers ended with major gains today, buoyed by a global rally as tensions in West Asia eased following a tentative Israel-Iran ceasefire. The Nifty settled above the 25,200 level.
- The S&P BSE Sensex zoomed 700.40 points or 0.85% to 82,755.51. The Nifty 50 index jumped 200.40 points or 0.80% to 25,244.75. In two consecutive trading sessions, the Sensex advanced 1.05% while the Nifty rose 1.09%.
- The S&P BSE Mid-Cap index rose 0.63% and the S&P BSE Small-Cap index added 1.59%.
- Among the sectoral indices, the Nifty Media index (up 1.99%), the Nifty IT index (up 1.64%) and the Nifty Consumer Durables index (up 1.43%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Private Bank index (down 0.03%), the Nifty PSU Bank index (up 0.20%) and the Nifty Bank index (up 0.28%) 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 **31168** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **SBIN**, **HDFCBANK**, **BAJFINANCE**, **INFY**.
- Short** position build up for the **July** series has been witnessed in **GAIL**, **NMDC**, **VBL**.

(Source: Capitaline F&O)

NIFTY AUTO	23827.80	23598.25	0.97%
NIFTY FMCG	54747.25	54346.30	0.74%
NIFTY IT	39046.30	38417.95	1.64%
NIFTY METAL	9329.20	9291.10	0.41%
NIFTY PHARMA	21804.80	21672.10	0.61%
NIFTY REALTY	1019.70	1014.25	0.54%
BSE CG	70703.12	71087.25	-0.54%
BSE CD	58832.52	58102.26	1.26%
BSE Oil & GAS	27077.59	27087.81	-0.04%
BSE POWER	6774.45	6737.96	0.54%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	38942.07	38790.56	0.39%
HANG SENG	24474.67	24177.07	1.23%
STRAITS TIMES	3925.98	3904.30	0.56%
SHANGHAI	3455.97	3420.57	1.03%
KOSPI	3108.25	3103.64	0.15%
JAKARTA	6832.14	6869.17	-0.54%
TAIWAN	22430.61	22188.76	1.09%
KLSE COMPOSITE	1519.79	1514.29	0.36%
ALL ORDINARIES	8779.90	8774.80	0.06%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	101657.64	111594.12
NSE F&O	383798.24	473855.85

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2427.74

(Source: [NSE](#))

Corporate News

- **Hindalco Industries Limited** announced that it has acquired 100% equity shares in US-based AluChem Companies. The transaction value is fixed at \$125 Million. The company plans to execute the deal through Aditya Holdings LLC. The company is a wholly-owned arm of Hindalco.
- **KEC International** has announced securing new civil project orders in India. The orders are worth Rupees 1,236 crore. These projects include high-rise residential developments in western India. The company will develop over 50 lakh square feet of residential space. KEC's order intake has surpassed Rupees 5,500 crore year-to-date. This reflects a 35 percent growth compared to last year.
- Gland Pharma Ltd. said that it has completed inspection as the US regulator issued an Establishment Inspection Report (EIR) for their Visakhapatnam facility. The receipt of the EIR marks the formal closure of the US health regulator's pre-approval inspection, which was conducted between February 19 and February 25, 2025.
- **Adani Energy Solutions Ltd** has secured transmission contracts worth approximately Rs. 44,000 crore.
- **Bharat Biotech** and GSK will reduce the price of their malaria vaccine, Mosquirix, to \$5 per dose by 2028, more than halving the current cost. This price cut, driven by process improvements and expanded production, aims to improve access to the vaccine in sub-Saharan Africa, where malaria deaths are high. Gavi supports the vaccine's rollout in twelve African countries.
- **Maruti Suzuki** is reportedly developing a new mid-size SUV, potentially named Escudo (codename Y17), to slot between the Brezza and Grand Vitara. Aimed at competing with the Hyundai Creta and Kia Seltos, the 5-seater SUV will likely share the Global C platform and offer various modern features. Engine options may include a 1.
- **Bajel Projects Limited** has secured a contract worth Rs. 100-200 Crore from a leading private company in the energy and power transmission sector. The order falls under the 'large' category, as per the company's internal

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TITAN	3652.20	3526.00	3.58%
INFY	1614.90	1581.60	2.11%
M&M	3215.50	3150.10	2.08%
GRASIM	2831.80	2780.90	1.83%
JSWSTEEL	1024.45	1007.00	1.73%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
BEL	406.05	418.50	-2.97%
KOTAKBANK	2198.30	2223.60	-1.14%
EICHERMOT	5576.00	5629.00	-0.94%
ONGC	241.91	243.92	-0.82%
AXISBANK	1213.30	1221.20	-0.65%

(Source: [Moneycontrol](#))

- **L&T Technology Services** said that its Sustainability segment has been selected by one of the world's leading energy companies as its exclusive global engineering partner for providing enterprise data and digital services.
- **Capacite Infraprojects** has picked up a fresh order worth Rs. 621 crore from the Saifee Burhani Upliftment Trust (SBUT). The work is part of the ongoing redevelopment at Bhendi Bazaar in Mumbai, one of the city's largest urban transformation projects.
- **PTC Industries**'s subsidiary, Aerolloy Technologies (ATL) has signed the memorandum of understanding (MoU) with Safran Aircraft, to manufacture the components and materials for military aircraft engines.

classification.

- **Sundaram Finance Holdings Limited** announced that its board has approved an acquisition of 4.99% equity stake in India Motor Parts & Accessories Limited (IMPAL). The transaction will take place through the block deal window.
- **Dr Lal Pathlabs** has expanded its genomics capabilities by adding Illumina's NovaSeq X Series to its dedicated genomics division, Genevolve. With the integration of Illumina's latest technology, DLPL can now deliver faster and more accurate genomic research insights.
- **Lupin** announced that it has received approval from the United States Food and Drug Administration (U.S. FDA) for its abbreviated new drug application (ANDA) for Prucalopride tablets.
- **Aurobindo Pharma** said that wholly owned step-down subsidiary CuraTeQ Biologics s.r.o. has obtained marketing authorization from the UK's Medicines and Healthcare products Regulatory Agency (MHRA) for Dyrupeg.
- **JB Chemicals & Pharmaceuticals** announced that it has received approval from the United States Food and Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA), Amitriptyline Hydrochloride Tablets USP.
- **Reliance Infrastructure** announced that its defence arm, Reliance Defence, has secured a major export order worth Rs 600 crore from Rheinmetall Waffe Munition GmbH.
- **Adani Total Gas** announced a strategic partnership with Jio-bp, the joint venture between Reliance Industries and bp Mobility, to transform the auto fuel retail experience in India.

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

Global News

- U.S. current account deficit widened by \$138.2 billion, or 44.3%, to \$450.2 billion in Q1 2025, up from a revised Q4 deficit of \$312 billion.
- U.S. house price index decreased by 0.4% from the previous month in April 2025. Year-on-year, house prices advanced by 3% in April, easing from 3.9% the month before.
- U.S. Conference Board said its consumer confidence index dropped 5.4 points to 93.0 in June, erasing nearly half of the sharp gain in May.
- France's consumer confidence held steady at 88 in June 2025, unchanged from the previous month.

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

Economic News

- Crude Oil traded at US\$ 64.84/bbl (IST 17:00).
- INR weakened to Rs. 86.08 from Rs. 86.97 against each US\$ resulting in daily change of 0.90%.
- S&P Global Ratings increased India's GDP growth forecast to 6.5%. This is due to lower crude prices and normal monsoon. Geopolitical tensions are unlikely to significantly impact the rupee or inflation. Global economy faces rising risks from Middle East turbulence. Domestic demand resilience will limit economic slowdown. India's GDP growth is projected at 6.7% for fiscal year 2027.
- The Statistics Ministry is adding Artificial Intelligence to its work. AI chatbots will be used in important surveys. This will give policymakers correct and current data. The Capex survey now has an AI chatbot. New surveys are coming, and old ones are being updated. A household income survey will start in February 2026.
- The Centre approved the procurement of up to 2.5 lakh metric tonnes of mangoes from farmers in Karnataka under the Market Intervention Scheme (MIS) for 2025-26 after Union Heavy Industries Minister HD Kumaraswamy appealed for it as mango growers are battling surplus production this mango season leading to a price fall. The procurement price is set at RS. 1,616 per quintal.
- Employees' Provident Fund Organisation subscribers might soon access their EPF money directly. They can use ATMs or UPI after linking bank accounts. The labour ministry is working on this project. A portion of the EPF will be frozen. A large part will be available for withdrawal. The EPFO is resolving software challenges.
- India and the UK are moving closer to signing a free trade agreement. Legal scrubbing of the text is progressing rapidly. Commerce Secretary Sunil Barthwal is in London to expedite the process. The agreement aims to boost trade between the two nations. It will eliminate taxes on key exports. The deal requires approval from both parliaments.
- The CBIC has extended the validity of No Objection Certificates for imported alcoholic beverages bottled at origin or in bulk with over 10% alcohol content. This follows FSSAI's clarification allowing 365-day validity for consignments without

expiry dates. Consignments exceeding this period can be revalidated after inspection and fee payment.

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

Forthcoming Events

Board Meetings as on 26/06/2025

Nestle India Limited	Bonus
Kaya Limited	Fund Raising
Digitide Solutions Limited	Financial Results

(Source: NSE)

Corporate Actions as on 26/06/2025

Infibeam Avenues Limited	Rights 67:267 @ Premium Rs 9/-
Prime Securities Limited	Dividend - Rs 1.50 Per Share

(Source: NSE)

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