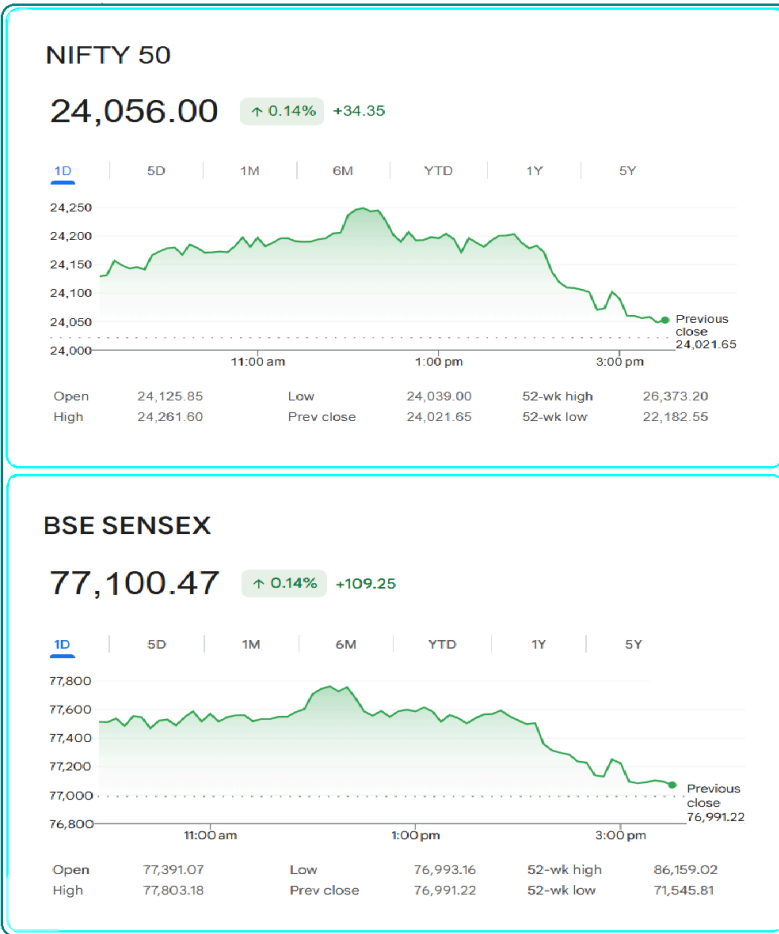


Index Chart



(Source: [Bloomberg](#))

Indian Markets

| Indices | Close | Previous | Change(%) |
|---------------------------|----------|----------|---------------|
| NIFTY 50 | 24056.00 | 24021.65 | 0.14% |
| S&P BSE SENSEX | 77100.47 | 76991.22 | 0.14% |
| NIFTY MID100 | 61795.50 | 62135.25 | -0.55% |
| NIFTY SML100 | 18790.35 | 18879.30 | -0.47% |

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

Market Wrap Up

- The key equity benchmarks ended with minor gains supported by broad-based buying across select sectors and positive global cues. Sentiment was also aided by easing crude oil prices and lower volatility, while investors tracked developments around global interest rate expectations. The Nifty settled above the 24,050 mark.
- The S&P BSE Sensex added 109.25 points or 0.14% to 77,100.47. The Nifty 50 index rose 34.35 points or 0.14% to 24,056.
- The BSE 150 MidCap Index declined 0.44% and the BSE 250 SmallCap Index fell 0.51%.
- Among the sectoral indices, the Nifty Auto index (up 2.25%), the Nifty FMCG index (up 0.68%) and the Nifty Realty index (up 0.33%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (down 1.37%), Nifty IT index (down 0.86%) and the Nifty Consumer Durables index (down 0.67%) 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 **48103** contracts at the end of the day.
- **Long** position build up for the **July** series has been witnessed in **RELIANCE, SBIN, ICICIBANK, HDFCBANK**.
- **Short** position build up for the **July** series has been witnessed in **BHARTIARTL, INFY, BAJFINANCE**.

(Source: Capitaline F&O)

Sectoral Indices

| Indices | Close | Previous | Change(%) |
|---------------|----------|----------|-----------|
| NIFTY BANK | 58177.05 | 58150.35 | 0.05% |
| NIFTY AUTO | 26977.75 | 26384.35 | 2.25% |
| NIFTY FMCG | 49419.25 | 49085.10 | 0.68% |
| NIFTY IT | 27330.85 | 27566.70 | -0.86% |
| NIFTY METAL | 12445.65 | 12618.75 | -1.37% |
| NIFTY PHARMA | 24969.50 | 25018.95 | -0.20% |
| NIFTY REALTY | 826.25 | 823.55 | 0.33% |
| BSE CG | 80938.07 | 81468.51 | -0.65% |
| BSE CD | 59369.44 | 59821.88 | -0.76% |
| BSE Oil & GAS | 26309.83 | 26654.49 | -1.29% |
| BSE POWER | 8043.89 | 8091.83 | -0.59% |

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

Asia Pacific Markets

| Indices | Close | Previous | Change (%) |
|----------------|----------|----------|------------|
| NIKKEI225 | 72366.34 | 69174.97 | 4.61% |
| HANG SENG | 23076.91 | 23412.18 | -1.43% |
| STRAITS TIMES | 5218.96 | 5215.99 | 0.06% |
| SHANGHAI | 4120.28 | 4110.81 | 0.23% |
| KOSPI | 8930.30 | 8471.02 | 5.42% |
| JAKARTA | 5999.04 | 5883.88 | 1.96% |
| TAIWAN | 46255.26 | 46043.60 | 0.46% |
| KLSE COMPOSITE | 1663.82 | 1682.13 | -1.09% |
| ALL ORDINARIES | 8951.60 | 9012.60 | -0.68% |

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

| Market | Current | Previous |
|----------|-----------|-----------|
| NSE Cash | 136051.69 | 122776.22 |
| NSE F&O | 458033.06 | 413862.68 |

(Source: [NSE](#))

FII Activities (Crores)

| ACTIVITIES | Cash |
|------------|--------|
| NET BUY | 383.76 |
| NET SELL | - |

(Source: [NSE](#))

Corporate News

- **Oil & Natural Gas Corpn** and **bp** have signed a new technical services contract on 25 June 2026. Under the agreement, bp has been appointed as the TSP for ONGC's fields in the Western Offshore Basin.
- **TVS Motor Company** announced the rollout of the one millionth TVS iQube from its manufacturing facility in Hosur.
- **RailTel Corporation of India** has received a Letter of Acceptance (LoA) worth Rs 29.83 crore from S Southern Power Distribution Company Of A P Limited for the implementation of a Software Defined-Wide Area Network (SD-WAN) solution.
- **Embassy Developments** signed a non-binding MoU with the Government of Uttar Pradesh for a proposed commercial real estate project in Lucknow, involving an estimated investment of around Rs 1,500 crore.
- **Texmaco Rail & Engineering** received a letter of acceptance (LoA) worth Rs 6.28 crore from Western Railway.
- **Onward Technologies** announced that it had secured an engineering services contract valued at Rs 33 crore from a leading global power management company.
- **Jupiter Wagons** has secured two major orders with a combined value of approximately Rs 264.32 crore from JSW (South) Rail Logistics Private Limited and Central Warehousing Corporation (CWC).
- **Suzlon Energy** has bagged a significant 400 MW wind energy EPC contract from Tata Power Renewable Energy Limited (TPREL). This latest deal, to be executed in Andhra Pradesh, pushes their combined order book past 1 GW. Suzlon will supply 127 advanced wind turbine generators and provide comprehensive project services, marking their fourth collaboration with TPREL and bolstering Suzlon's presence in Andhra Pradesh.
- **Duncan Engineering** announced that it has received an order worth Rs 5.54 crore from Bharat Petroleum Corporation (BPCL), a Government of India undertaking.

Top Gainers

| SCRIP NAME | Close | Previous | Change (%) |
|-------------------|---------|----------|--------------|
| INDIGO | 5207.20 | 4961.40 | 4.95% |
| ADANIEN | 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](#))

- **Sheetal Cool Products** has received an export order for the supply of its products, valued at approximately Rs 4 crore.

- **Jindal Saw** announced that the American Petroleum Institute (API) reinstated all its API licenses, allowing it to affix the API Monogram on its seamless pipes.
- **NLC India** announced that its subsidiary, NLC India Renewables (NIRL) has signed joint venture agreement with Odisha Renewable Energy Development Agency (OREDA) to develop green energy power plants in Odisha.
- **Route Mobile** said that a a cyber security incident has occurred at Masivian S.A.S which has impacted certain systems within the Masivian environment located in South America, primarily in Colombia, and relates only to customers and systems based in C.
- **Electrosteel Castings** announced the resumption of its Mini Blast Furnace (MBF) Production Facility at the Khardah Works, West Bengal from 24th June 2026.
- **Atmastco** announced that it has secured a purchase order worth Rs 57.33 crore from **L&T MHI Power Boilers Pvt Ltd** for the fabrication and supply of ceiling girders with ICB boiler area structures.

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

Global News

- U.S. current account deficit widened to a seasonally adjusted \$226.8 billion in the first quarter of 2026 from a revised \$221.1 billion in the last quarter of 2025.
- U.S. new home sales tumbled 7.3% month-over-month to a seasonally adjusted annualized rate of 580 thousand in May 2026, the lowest in four months, following an upwardly revised 626 thousand in April.
- U.S. building permits decreased 0.9% month-over-month to a seasonally adjusted annual rate of 1.410 million in June 2026, below the preliminary estimates of 1.413 million.
- Germany's GfK Consumer Climate Indicator edged up to -29.2 heading into July 2026 from a revised -29.7 in June.
- French consumer confidence indicator rose to 84 in June 2026 from a more than three-year low of 82 in the previous month.
- Australia's seasonally adjusted unemployment rate inched down to 4.4% in May, from April's more than four-year high of 4.5%. Employment increased by 40,300 to 14.74 million, surpassing estimates for a 30,000 rise, the strongest employment gain since December, rebounding from an upwardly revised loss of 40,700 jobs in April.

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

Economic News

- Crude Oil traded at US\$ 69.44/bbl (IST 17:00).
- INR weakened to Rs. 94.41 from Rs. 94.67 against each US\$ resulting in daily change of 0.27%.
- India and the US are nearing an interim trade deal, with both nations reporting significant progress in recent negotiations. Commerce Minister Piyush Goyal and US Trade Representative Jamieson Greer concluded two days of talks, aiming to finalize the first phase of a bilateral trade agreement. Discussions focused on market access, digital trade, and non-tariff barriers, with both sides committed to a balanced pact delivering tangible benefits.
- India is aiming to become a global textile powerhouse, targeting \$100 billion in exports by 2030. The strategy emphasizes sustainability, including recycling and environmental compliance, alongside leveraging free trade agreements. Key initiatives involve digital product passports, supporting MSMEs, and enhancing product-market strategies. The focus is on translating policy into action across all levels to boost the sector and promote 'Brand India' internationally.
- India is launching a new Index of Services Production (ISP) to track the services sector's growth, mirroring the Index of Industrial Production. This crucial macroeconomic indicator, with 2024-25 as the base year, will be released monthly with a 60-day lag, starting with April 2026 data on July 14. The ISP aims to provide high-frequency insights into the dominant services sector's performance, complementing existing economic data.
- Indian onion exporters are urging the government against imposing export curbs, citing a surge in wholesale prices at Lasalgaon market. Delayed sowing and adverse weather have impacted production, pushing prices up. Exporters warn that restrictions could jeopardize markets painstakingly regained after previous bans, potentially shifting buyers to competing nations and damaging India's trade reputation.
- A government committee reviewing India's Special Economic Zone (SEZ) policy will hold a stakeholder meeting on June 30 to examine how free trade agreements are affecting export hubs and to explore reforms aimed at boosting import substitution.
- India's crucial monsoon rains are delayed, disrupting the nation's \$300 billion farm economy just as planting season begins. This agricultural setback, exacerbated by a developing El Niño, threatens staple crops like rice, cotton, and soybeans, impacting prices and potentially fueling inflation. While India's food system shows resilience, worsening climate conditions pose a growing challenge to this vital agricultural lifeline.
- India's Ministry of Statistics has released a discussion paper on valuing coal assets monetarily, aligning with UN environmental accounting standards. This initiative aims to provide crucial data for policymaking and sustainable development by assessing resource value and depletion costs. The paper also presents physical coal accounts, highlighting India's significant production and its role in the nation's energy security and industrial growth. Feedback is now invited.
- India's retail lending sector is poised for decades of growth, fueled by digital innovation, financial inclusion, and rising incomes. Housing, vehicle, and gold loans are set to expand significantly, with technology and data-driven approaches reshaping credit delivery.
- India is poised to approve a significant \$370 million investment from Horse Powertrain Ltd., a hybrid-engine venture backed by China's Geely and France's Renault. This move, one of the largest Chinese-linked manufacturing investments

in years, will see advanced hybrid powertrains built in India, potentially at Renault's Chennai plant.

- India's ambitious renewable energy expansion faces a significant climate threat, with \$55 billion in planned solar, wind, and hydropower assets vulnerable to extreme weather by 2030. Ninety percent of proposed capacity across ten states is at high risk from events like floods and wildfires. This highlights the urgent need for resilience measures to protect investments and ensure the nation's clean energy transition remains on track.

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

Forthcoming Events

Board Meetings as on 26/06/2026

| | |
|---|--------------|
| Genesys International Corporation Limited | Fund Raising |
| Power Grid Corporation of India Limited | Fund Raising |

Board Meetings as on 27/06/2026

| | |
|------------------------|--------------|
| IIFL Finance Limited | Fund Raising |
| PTC Industries Limited | Fund Raising |

Board Meetings as on 29/06/2026

| | |
|-------------------------------|--------------|
| Ajooni Biotech Limited | Fund Raising |
| Hindustan Aeronautics Limited | Dividend |
| SIS LIMITED | Buyback |
| Viceroy Hotels Limited | Fund Raising |
| Yes Bank Limited | Fund Raising |

(Source: NSE)

Corporate Actions as on 29/06/2026

| | |
|--|------------------------------|
| Jyothy Labs Limited | Dividend - Rs 3.50 Per Share |
| Kajaria Ceramics Limited | Buy Back |
| Kalpataru Projects International Limited | Dividend - Rs 11 Per Share |
| Kansai Nerolac Paints Limited | Dividend - Rs 2.50 Per Share |
| Raymond Lifestyle Limited | Dividend - Re 1 Per Share |

(Source: NSE)

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